Prince William Area HMIS

Workflow and Data Quality Guide

ClientPoint

ShelterPoint

Service Transactions & Funding

Administration

2015

February 2015

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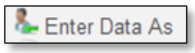
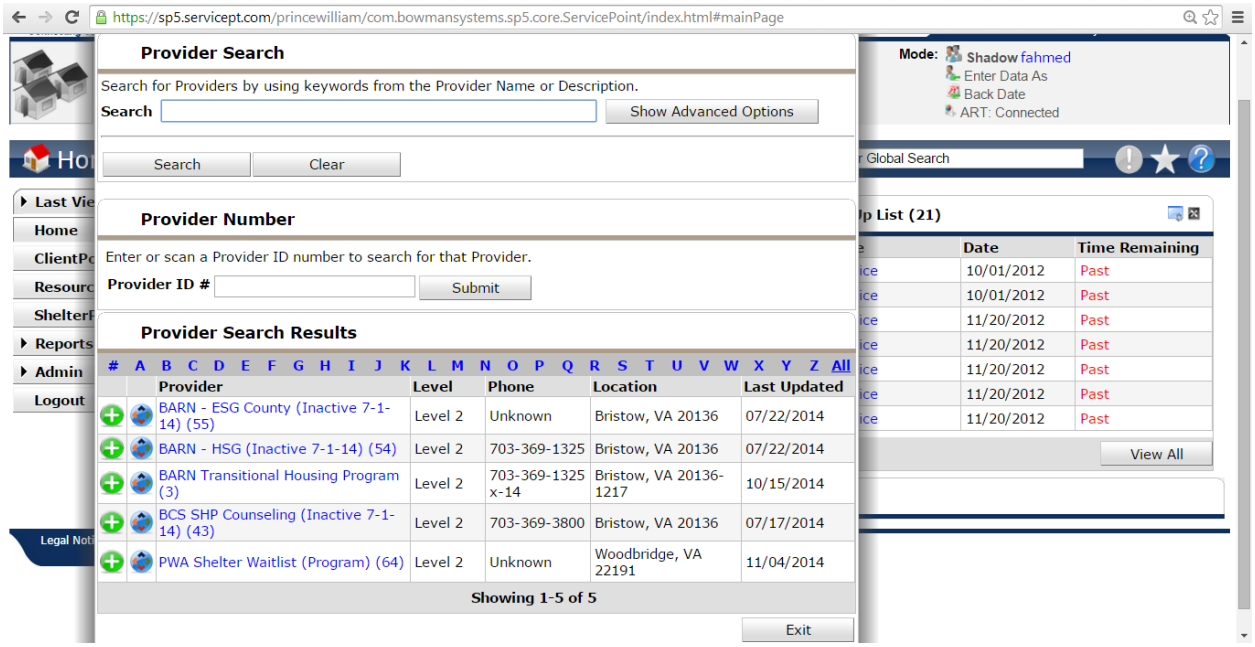
Entering Client Data into ClientPoint

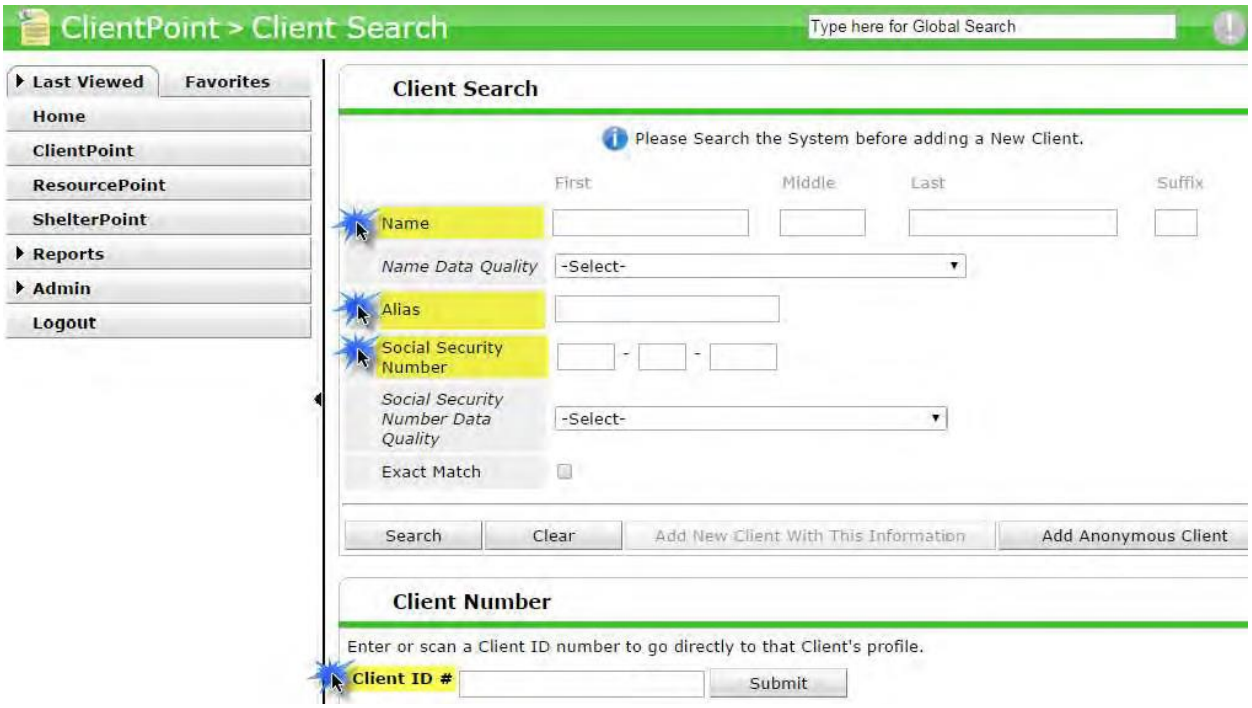
Select the correct Enter Data As provider list by clicking 

(Top Right of the Screen), then select the correct Provider by clicking green plus sign next to the name of that Provider.



Click on the

ClientPoint link in the left hand navigation panel.



Search for the client by last name only before creating a new client record**.** This will bring up all possible scenarios for the client name (i.e. Susan Smith, Susie Smith, Suzie Smith). We have over 17,000 client entries, and it is likely your client already exists in ServicePoint!!

Matching Client Records will be listed under the "Client Results" section (at the bottom of the page).

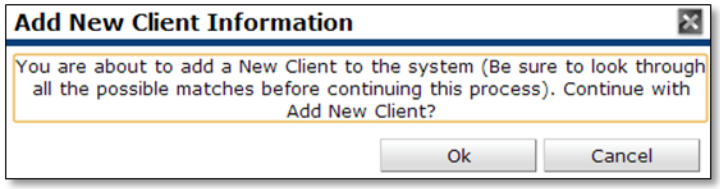
If No matches are found, clear the form and search by the last four digits of the client's SSN.

If the client is not found, enter the Client's full First and Last Name, SSN, and SSN Data Quality. Search one last time before clicking on the Add New Client with This Information button.

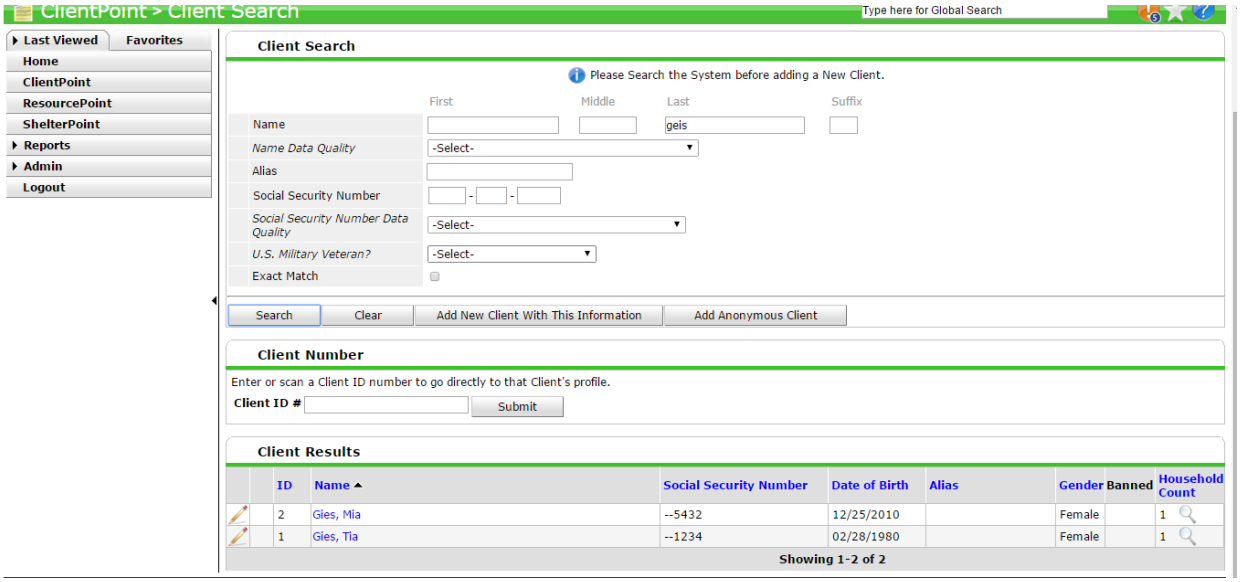
If no match exists, create a new client record by clicking on the

to create a new Client Profile.

A warning window will open with a warning to look through all possible matches before continuing, click the Ok button.

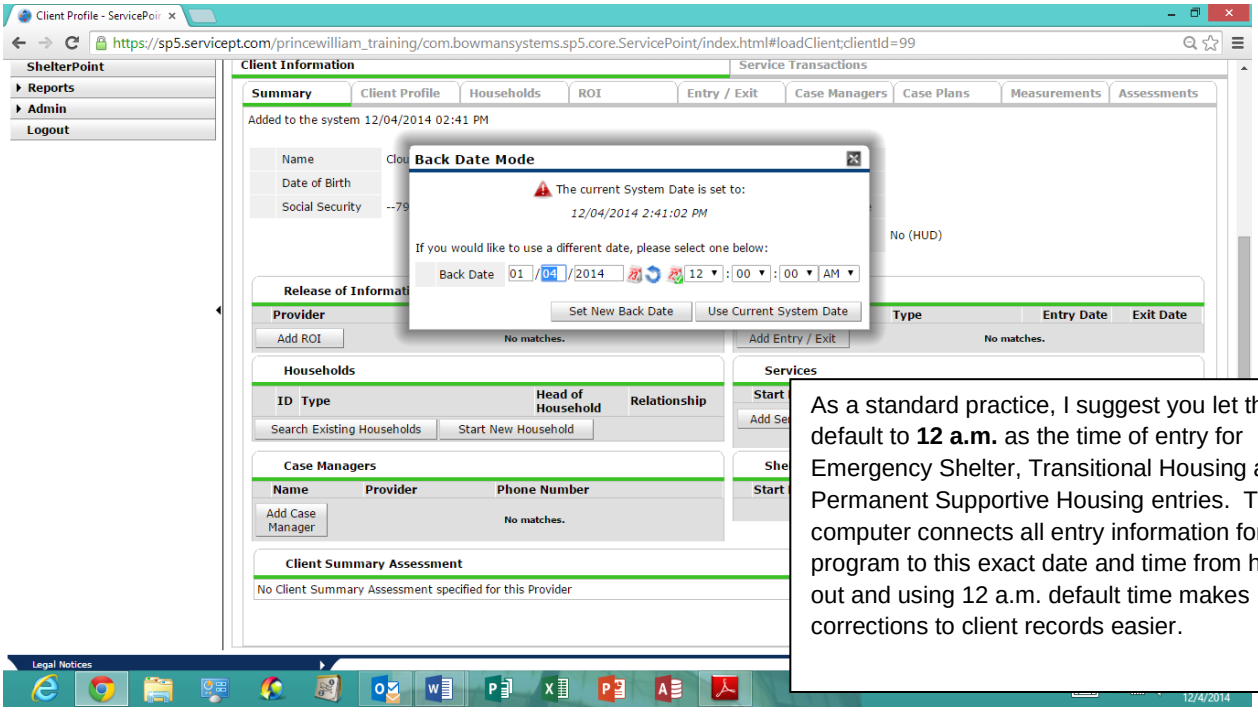

Add New Client Information
You are about to add a New Client to the system (Be sure to look through all the possible matches before continuing this process). Continue with Add New Client?
Ok
Cancel

If one of the clients is a match, names will appear on the screen under Client Results. Click on the pencil next to the ID in the Client Results section at the bottom of the page.



Note: If the client has duplicate records, email HMIS System Administrator with the names and client ID's duplicated so the client records can be merged. If duplicate record exists, click the pencil next to the client with the lowest client ID # to work with. Do not create another record for an existing client!!

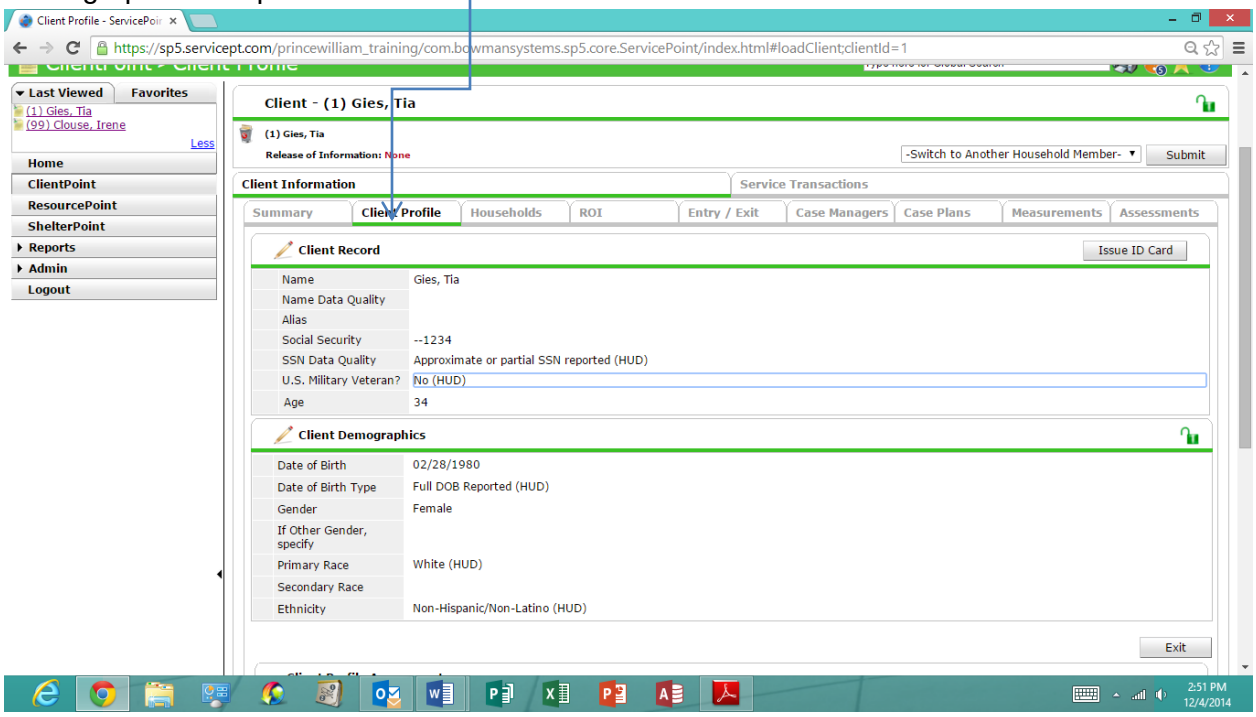
In the **Back Date Mode Window** Back Date to the Date of Entry when creating the client record, or backdate to the date of the change if making a change to the record.



As a standard practice, I suggest you let the time default to **12 a.m.** as the time of entry for Emergency Shelter, Transitional Housing and Permanent Supportive Housing entries. The computer connects all entry information for your program to this exact date and time from here on out and using 12 a.m. default time makes corrections to client records easier.

Move across Tabs in the record from left to right as you create the entry for your program.

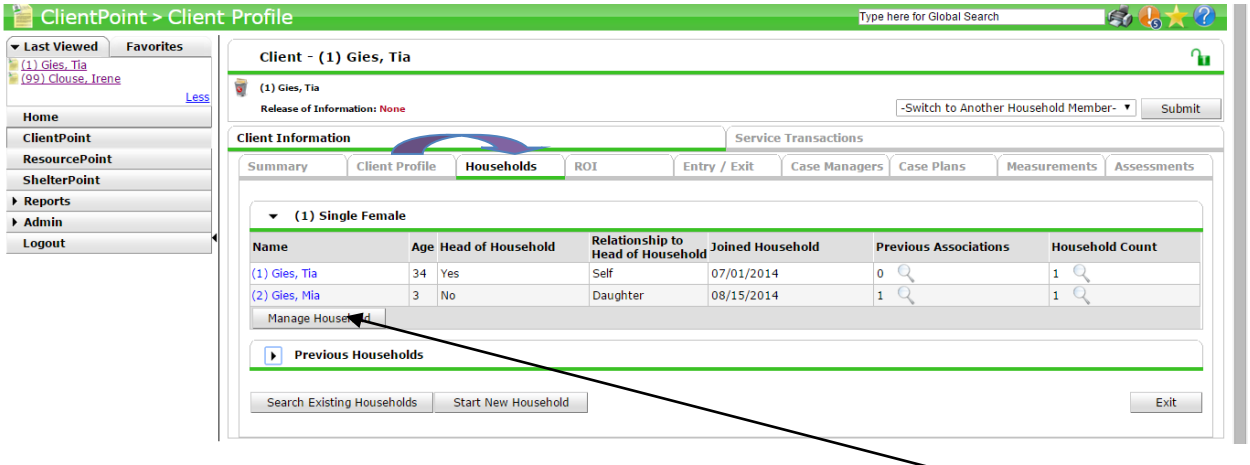
Enter information in the Client Profile Tab. Click the pencil next to Client Record and Client Demographics to input information



Create Household

Use the Household Tab only if there are 2 or more persons in the household. If you are working with a single person, skip the Household Tab and go directly to the ROI.

If a household already has been created, do not create another household.



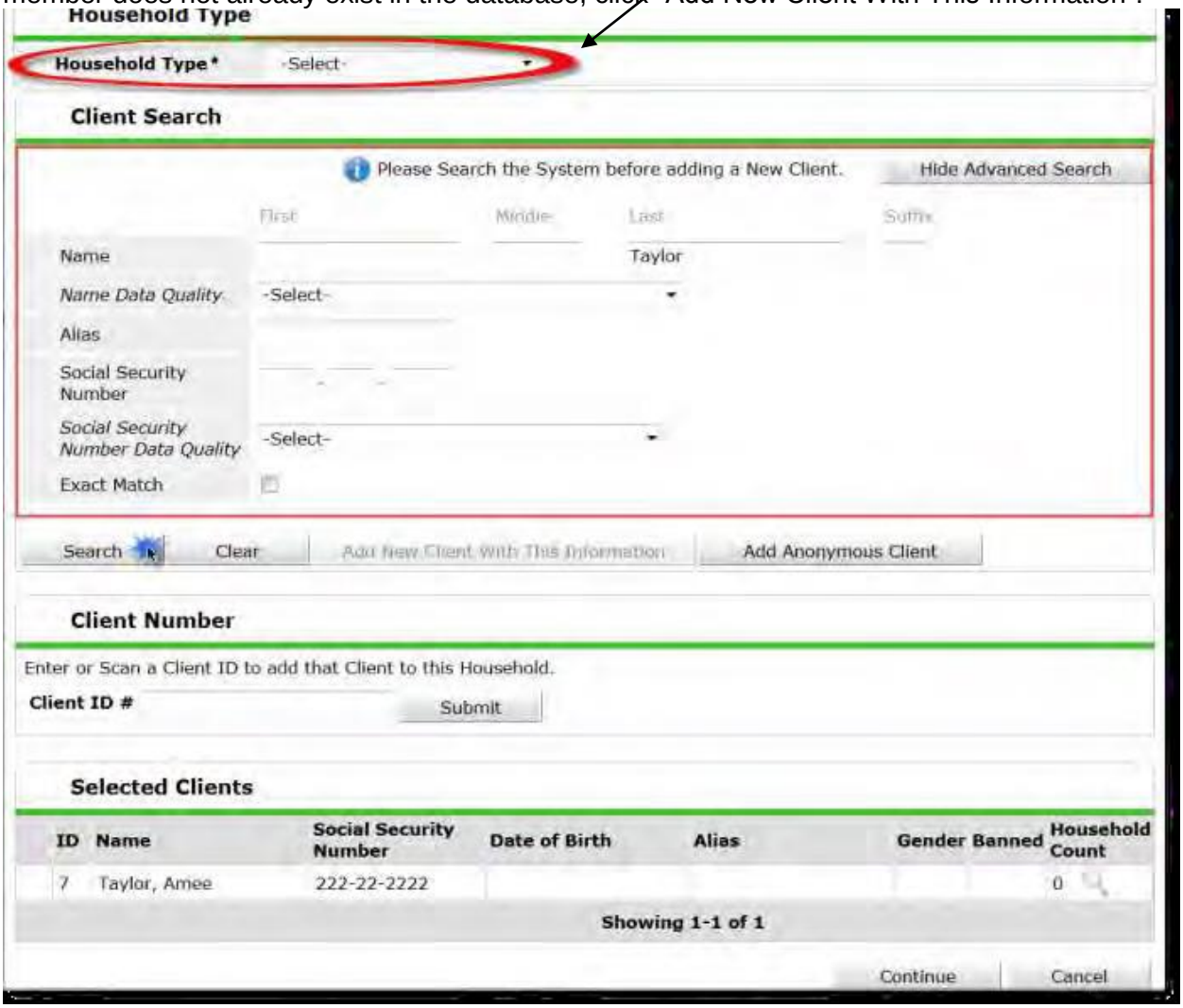
If the household exists, but not all the household members are showing, click the Manage Household button to add other household members. Household members who are no longer with the household can be deleted by clicking Manage Household and clicking on the red circle.

If the household does not exist, Click Start New Household to create a New Household starting with the head of household

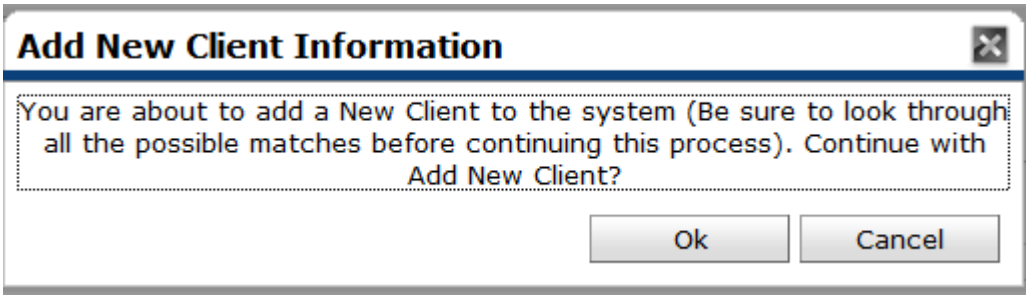
Each household member needs to have a separate client record created and this household area is like a virtual paperclip connecting each file as a household

When the Household Pop-Up displays, select the Household Type

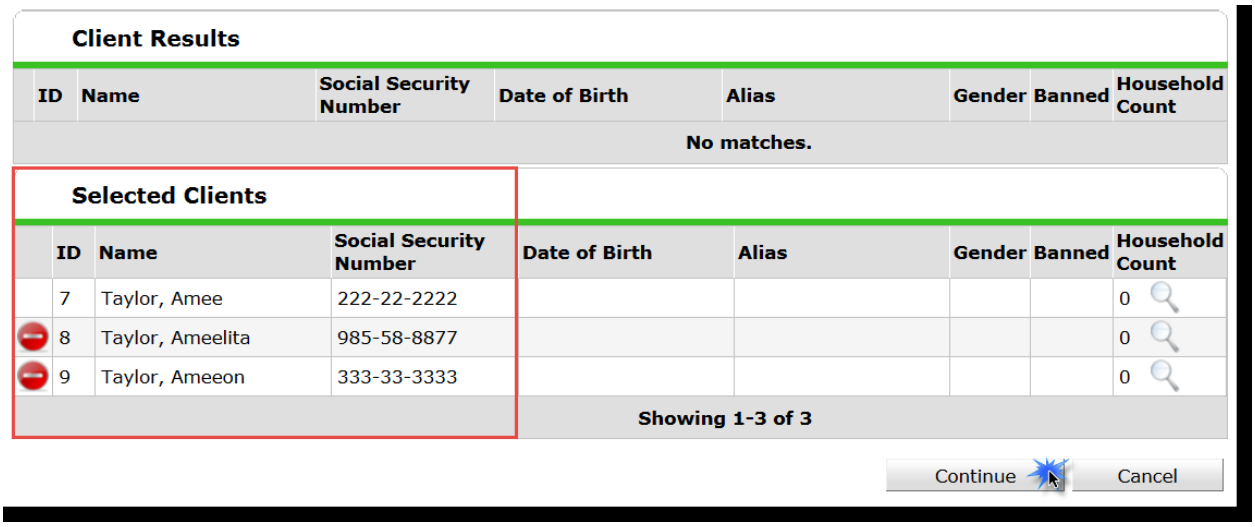
Search for each additional household member. Search for the next household member by last name only to bring up all previous entry possibilities for that person If the additional household member does not already exist in the database, click "Add New Client With This Information".



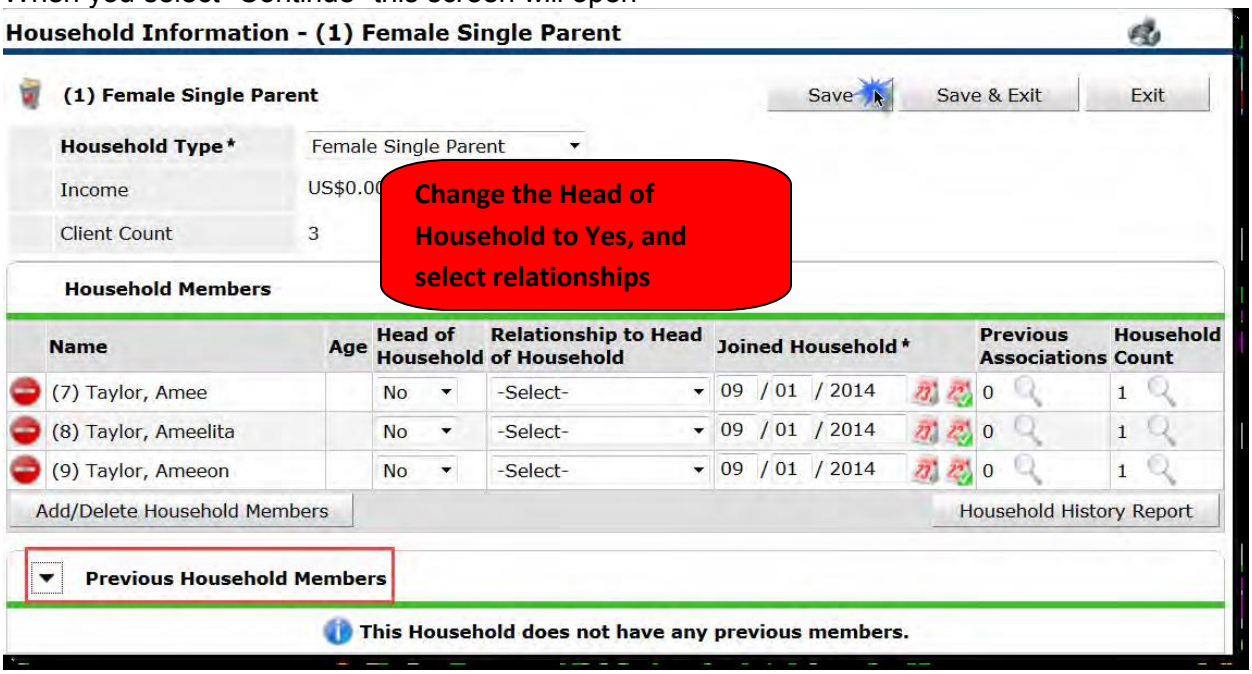
You will see this message each time you Add a new Household Member.


Add New Client Information
You are about to add a New Client to the system (Be sure to look through all the possible matches before continuing this process). Continue with Add New Client?
Ok
Cancel

Clients added to the household will appear at the bottom of the page under the “Selected Clients” section. Click “Continue” button once all household members have been added to the group.



When you select “Continue” this screen will open

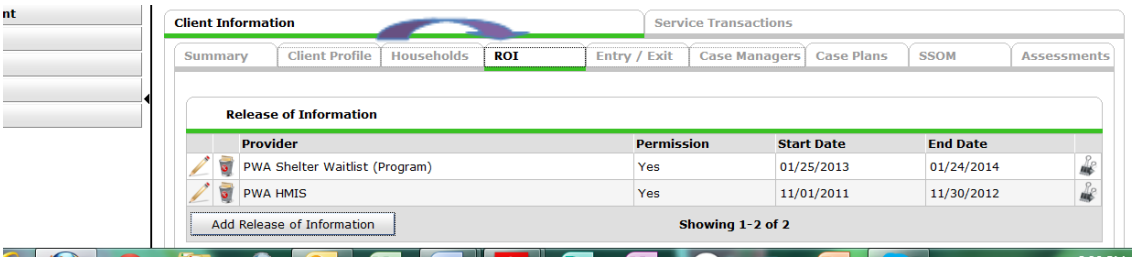


Then Complete:

- **Head of Household** - Defaults to “No” so only change to “Yes” on the one person that is the Head of Household.
- **Relationship to Head of Household** – Select the appropriate relationship. The client that is head of household should have “Self” in this field.
- **Joined Household** - Only change *if different from Back Date or Current System Date*
- Click the SAVE button.
- Previous Household Members can be viewed by clicking the black arrow/triangle icon to expand the page section.

Once these steps are completed the household has been created

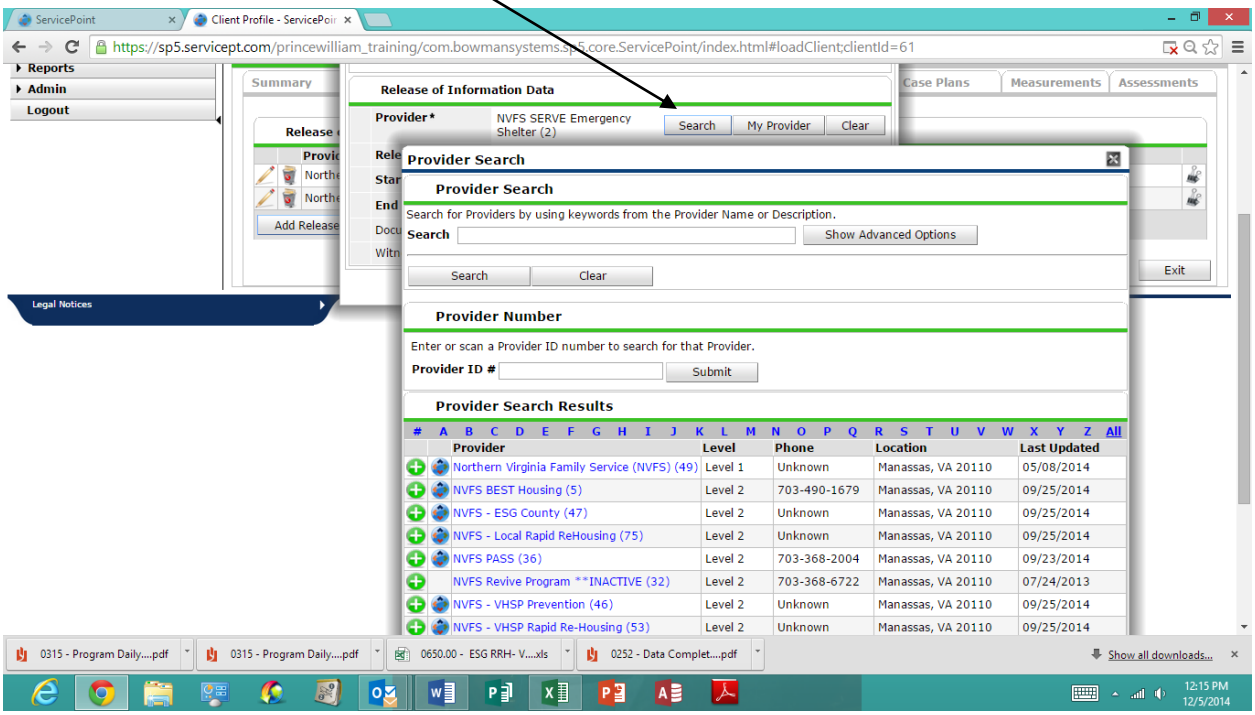
Move to the **ROI Tab.** Click the **Add Release of Information button** to enter the dates of the Release of Information for your program. Click on the boxes next to each household member to include them in the ROI.



Creating Multiple Program ROI's

Agencies with multiple programs have the option to create Multiple Program ROI's for all agency programs at one time. If this is desired, contact the HMIS System Administrator for Multiple ROI set up.

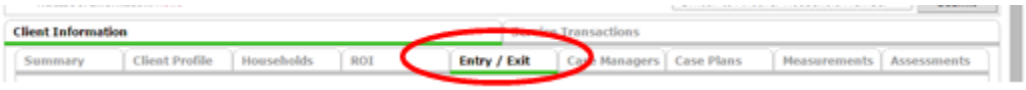
With the Multiple ROI set up activated, when you click the ROI tab the ROI screen will pop up then you can click the Search button to the right of Provider name to add the other programs, and the screen to the right will allow you to select additional programs.by clicking the green ball.



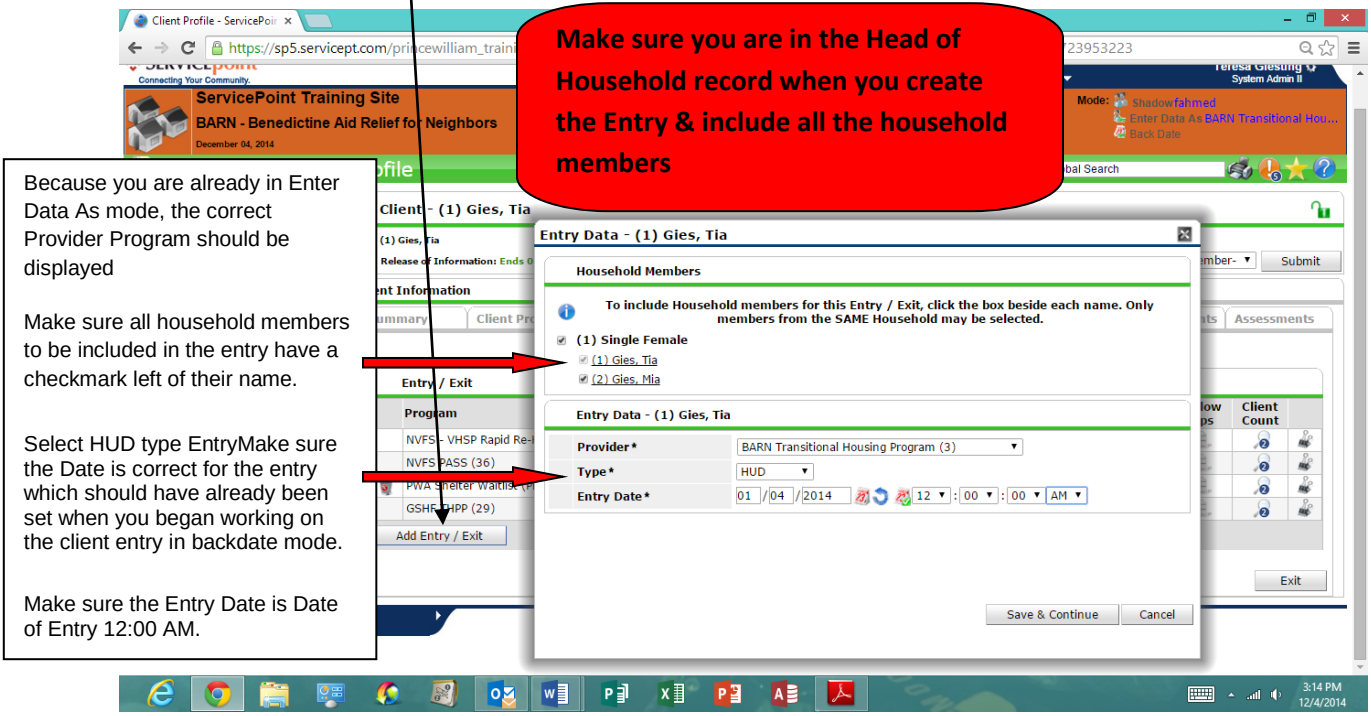
Create Program Entry for your program

(Waitlist and Winter Shelter go to ShelterPoint as those programs are set up to do Entry/Exit through ShelterPoint)

-From the Head of Household Entry Tab



Then click **Add Entry/Exit**

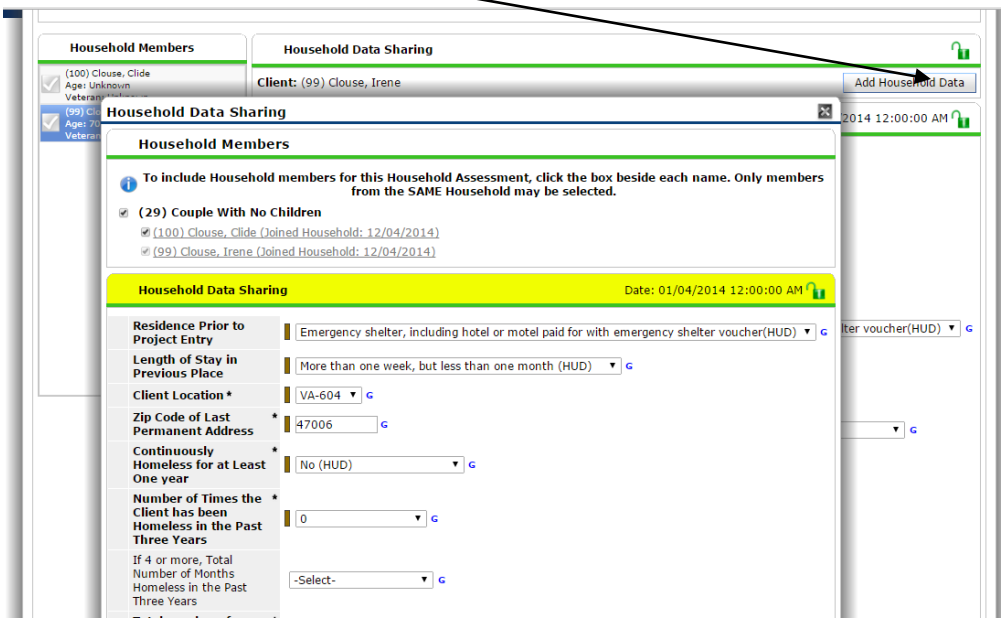

Make sure you are in the Head of Household record when you create the Entry & include all the household members
Because you are already in Enter Data As mode, the correct Provider Program should be displayed
Make sure all household members to be included in the entry have a checkmark left of their name.
Select HUD type EntryMake sure the Date is correct for the entry which should have already been set when you began working on the client entry in backdate mode.
Make sure the Entry Date is Date of Entry 12:00 AM.
ServicePoint Training Site
BARN - Benedictine Aid Relief for Neighbors
Entry Data - (1) Gies, Tia
Household Members
To include Household members for this Entry / Exit, click the box beside each name. Only members from the SAME Household may be selected.
(1) Single Female
(1) Gies, Tia
(2) Gies, Mia
Provider*
BARN Transitional Housing Program (3)
Type*
HUD
Entry Date*
01/04/2014
12:00 AM
Save & Continue
Cancel
Add Entry / Exit
Exit

- Select all household members that will be entered into the program as appropriate by clicking the box next to their name or clicking the box left of the household type will auto select all the displayed household members.
- Provider is defaulted to the provider you're signed in as or provider that you're Entering Data As (EDA)
- Select appropriate Entry Type "HUD"
- Entry date and time is defaulted to the current system date or the date and time you have backdated to
- Click Save & Continue

Household Data Sharing

Use the Household Data Sharing feature which will copy to the other household members the responses to several required data elements (Residence Prior to Project Entry, Length of Stay in Previous Place, Client Location, Homeless questions, Zip Code, and Domestic Violence). This can save time on data entry for the remainder of the Household members.

- Click Add Household Data to open the household data sharing assessment.


Household Members
Household Data Sharing
Client: (99) Clouse, Irene
Add Household Data
Household Data Sharing
Household Members
To include Household members for this Household Assessment, click the box beside each name. Only members from the SAME Household may be selected.
(29) Couple With No Children
(100) Clouse, Clide (Joined Household: 12/04/2014)
(99) Clouse, Irene (Joined Household: 12/04/2014)
Household Data Sharing
Date: 01/04/2014 12:00:00 AM
Residence Prior to Project Entry
Emergency shelter, including hotel or motel paid for with emergency shelter voucher(HUD)
Length of Stay in Previous Place
More than one week, but less than one month (HUD)
Client Location *
VA-604
Zip Code of Last Permanent Address *
47006
Continuously Homeless for at Least One year *
No (HUD)
Number of Times the Client has been Homeless in the Past Three Years *
0
If 4 or more, Total Number of Months Homeless in the Past Three Years
-Select-

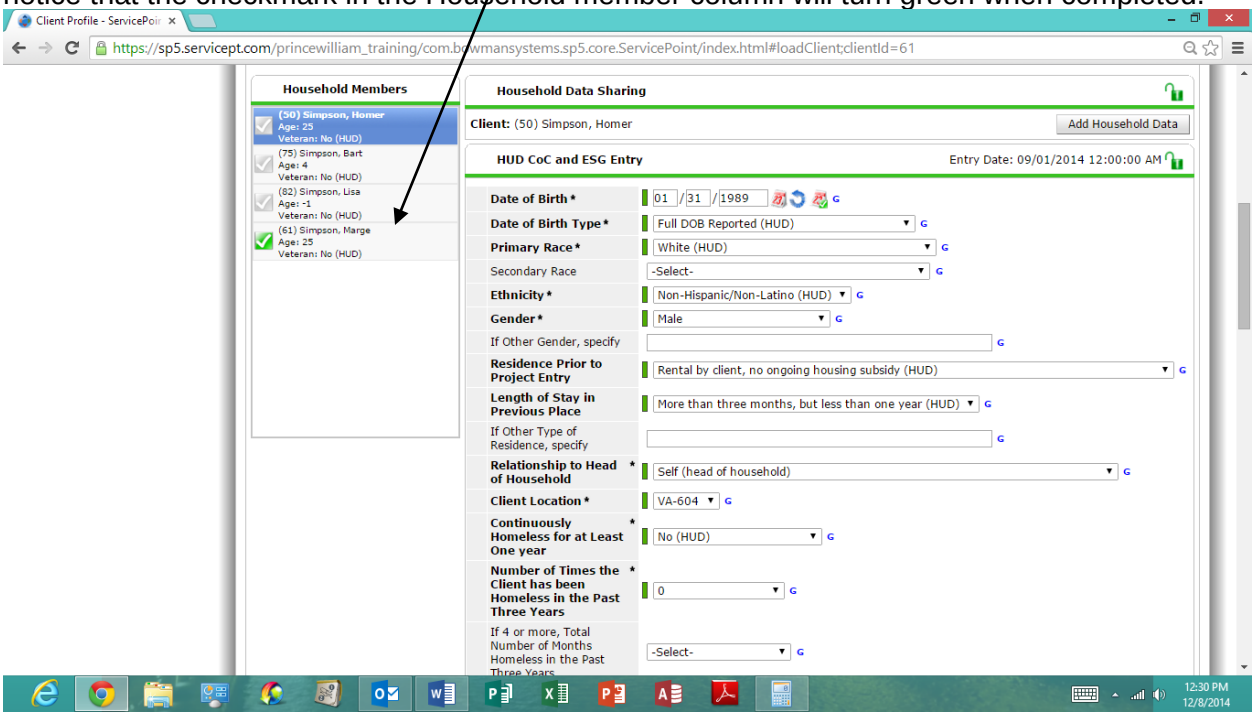
- Select the household members to include in the Data Sharing.
- Answer the questions for the head of household in the Household Data Sharing screen.
- Be sure to click Save & Exit!! If you don't see the Save, Save & Exit, Exit buttons on your screen you will need to move this assessment to the left of your screen so the buttons show. Once you Save & Exit, you will see the responses copied to the other household members as you select them and complete their entry.

HUD CoC and ESG Entry Assessment

Next complete all the questions in the HUD CoC and ESG Entry Assessment for head of household and Click Save, (not Save and Continue)

Then you can easily move to another household member Entry by clicking on their name in the left side Household Members navigation panel.

As you compete and Save the HUD CoC and ESG Entry for each household member, you will notice that the checkmark in the Household member column will turn green when completed.



The responses to Type of Living Situation, Housing Status, Zip Code, Zip Quality, and Domestic Violence should carry over to each household member if you followed the Household Data Sharing instructions above, so you won't need to reenter the common household information.

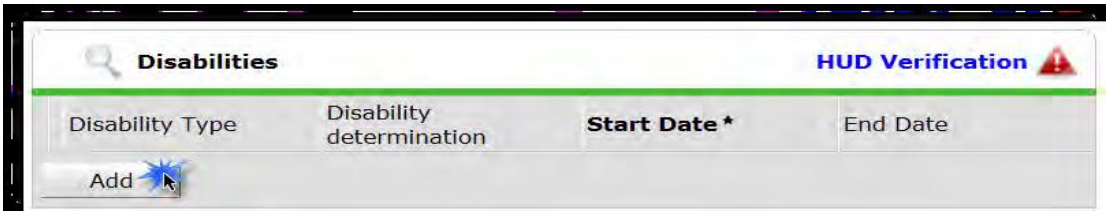
- Answer all questions on the **Entry Assessment**. These fields are important for reporting status at Entry.
- Follow the screen from top to bottom
- Click Save (not Save and Exit) then click on each household member on the left Household Members navigation panel to complete their Entry Assessments
- Green checkmarks will appear next to each household member's name as their assessment questions are answered & saved.

HUD Verification Checks for Medical Insurance, Disability, Income and Non Cash Benefits

HUD ***requires*** that YES and NON-YES answers for Monthly Income, Non-Cash Benefits, Health Insurance and Disabilities be verified during Entry, Updates (Interims), Annual Assessments, Exits and Follow-Up for all adults 18 and older.

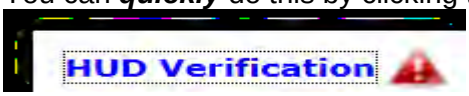
For Children under 18 Heath Insurance and Disabilities must be verified during Entry, Updates (Interims), Annual Assessments, Exits and Follow-Up

- These can be updated individually by clicking “ADD” and manually entering the information for each sub-assessment and fields within those sub-assessments

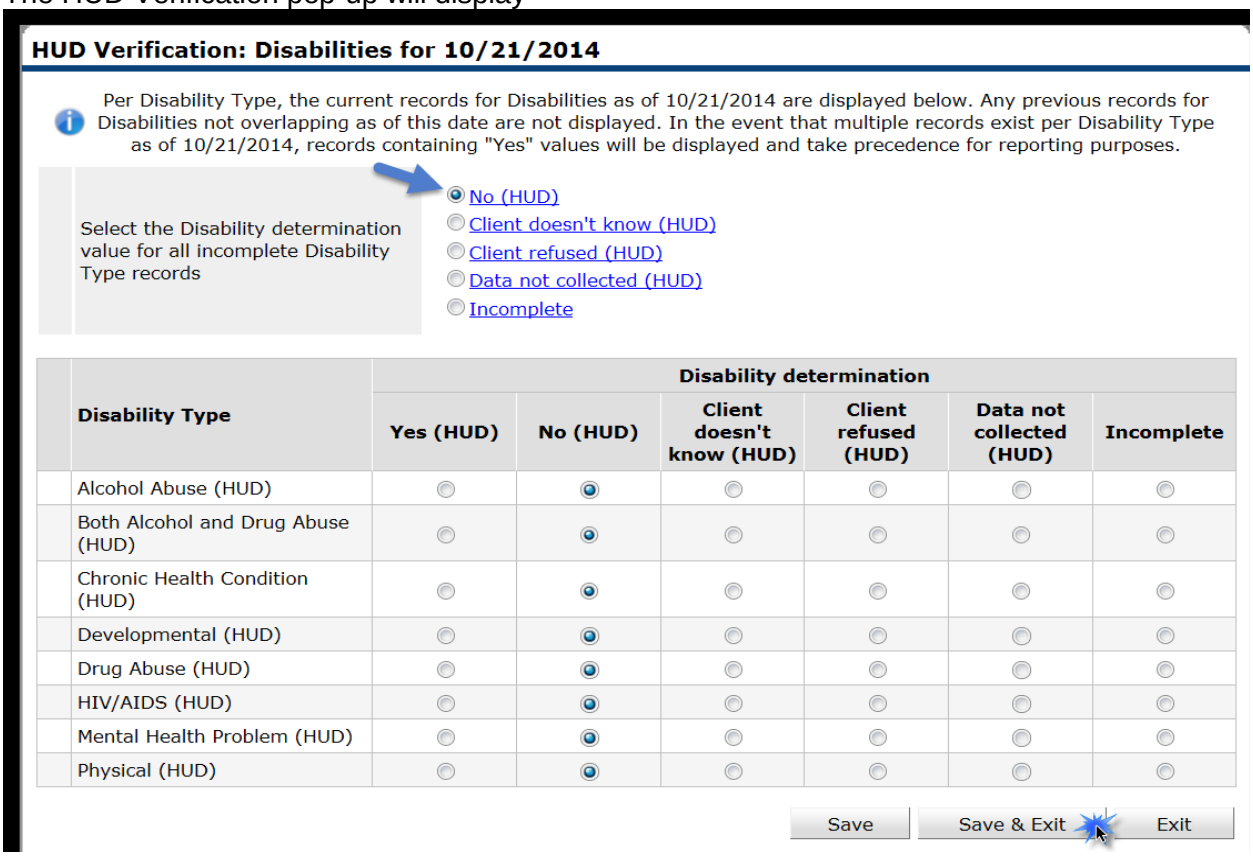


OR

- You can ***quickly*** do this by clicking the **HUD Verification** link

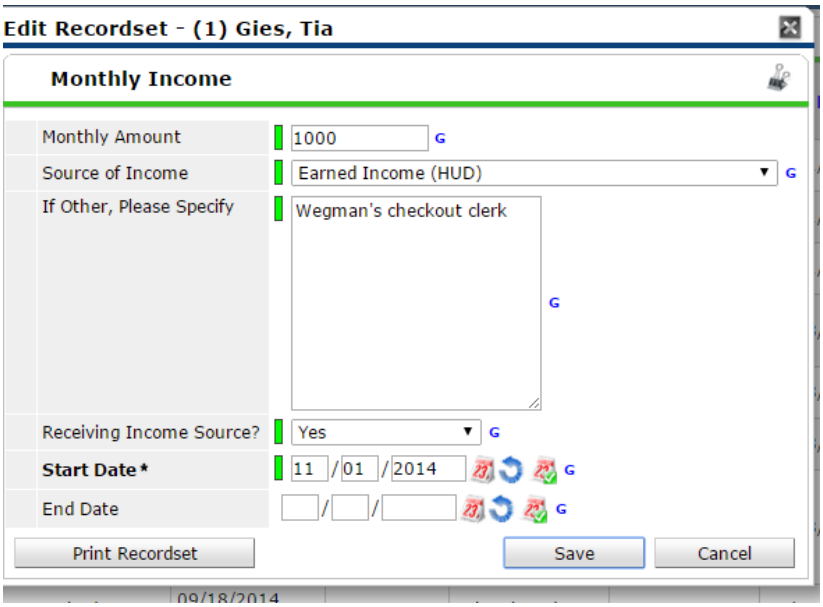


- The HUD Verification pop-up will display

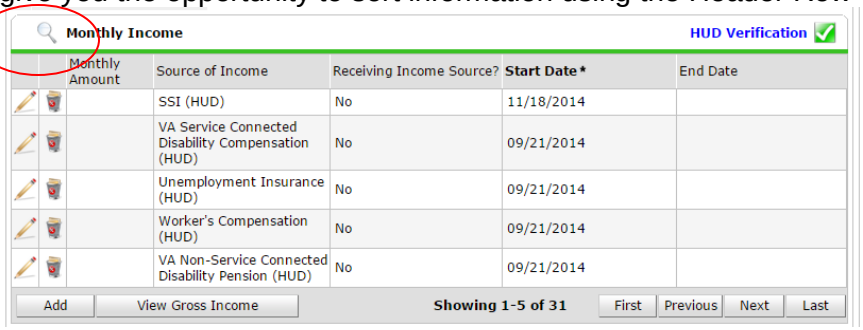

HUD Verification: Disabilities for 10/21/2014
Per Disability Type, the current records for Disabilities as of 10/21/2014 are displayed below. Any previous records for Disabilities not overlapping as of this date are not displayed. In the event that multiple records exist per Disability Type as of 10/21/2014, records containing "Yes" values will be displayed and take precedence for reporting purposes.
Select the Disability determination value for all incomplete Disability Type records
No (HUD)
Client doesn't know (HUD)
Client refused (HUD)
Data not collected (HUD)
Incomplete
Disability Type
Disability determination
Yes (HUD)
No (HUD)
Client doesn't know (HUD)
Client refused (HUD)
Data not collected (HUD)
Incomplete
Alcohol Abuse (HUD)
Both Alcohol and Drug Abuse (HUD)
Chronic Health Condition (HUD)
Developmental (HUD)
Drug Abuse (HUD)
HIV/AIDS (HUD)
Mental Health Problem (HUD)
Physical (HUD)
Save
Save & Exit
Exit

- You can quickly select all the “No” answers by clicking the Radio button at the top of the pop screen

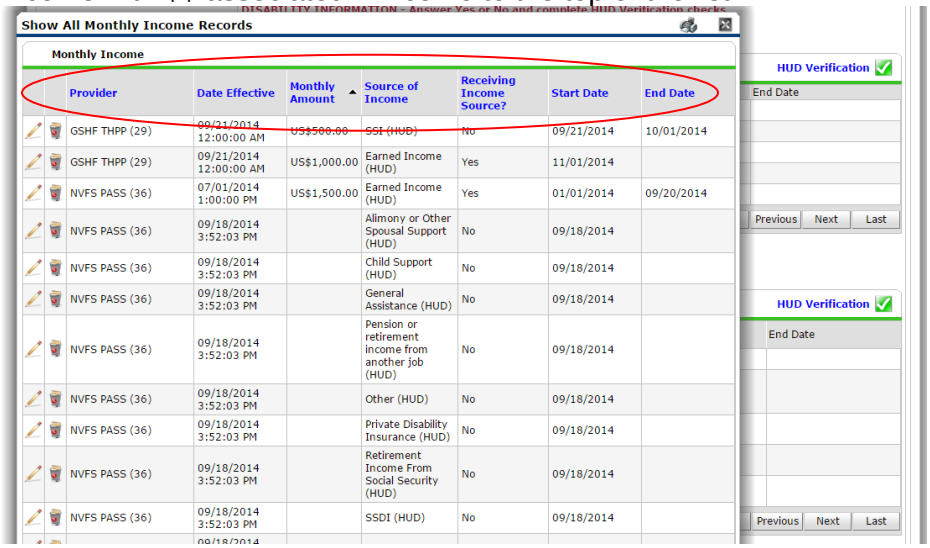
- If a “Yes” is selected, you will have another pop-up display to complete pertinent information about that benefit or income



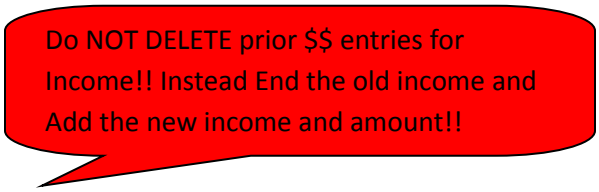
Clicking the Magnifying glass next to the Monthly Income, Non-Cash Benefits, Medical Insurance and Disabilty will open the information recorded for the client, and will give you the opportunity to sort information using the Header Row



The Header row can be used to sort the columns by clicking on the Blue Heading and black arrow to the right of the column selected. By clicking the Monthly Amount heading sources of income with $$ associated will come to the top of the list.


Show All Monthly Income Records
Monthly Income
Provider
Date Effective
Monthly Amount
Source of Income
Receiving Income Source?
Start Date
End Date
GSHF THPP (29) 09/21/2014 12:00:00 AM US$500.00 SSI (HUD) No 09/21/2014 10/01/2014
GSHF THPP (29) 09/21/2014 12:00:00 AM US$1,000.00 Earned Income (HUD) Yes 11/01/2014
NVFS PASS (36) 07/01/2014 1:00:00 PM US$1,500.00 Earned Income (HUD) Yes 01/01/2014 09/20/2014
NVFS PASS (36) 09/18/2014 3:52:03 PM Alimony or Other Spousal Support (HUD) No 09/18/2014
NVFS PASS (36) 09/18/2014 3:52:03 PM Child Support (HUD) No 09/18/2014
NVFS PASS (36) 09/18/2014 3:52:03 PM General Assistance (HUD) No 09/18/2014
NVFS PASS (36) 09/18/2014 3:52:03 PM Pension or retirement income from another job (HUD) No 09/18/2014
NVFS PASS (36) 09/18/2014 3:52:03 PM Other (HUD) No 09/18/2014
NVFS PASS (36) 09/18/2014 3:52:03 PM Private Disability Insurance (HUD) No 09/18/2014
NVFS PASS (36) 09/18/2014 3:52:03 PM Retirement Income From Social Security (HUD) No 09/18/2014
NVFS PASS (36) 09/18/2014 3:52:03 PM SSDI (HUD) No 09/18/2014
HUD Verification
End Date
Previous
Next
Last

If the client has prior entries and history, changes to income, non cash, medial insurance and disability can be edited by clicking the pencil.

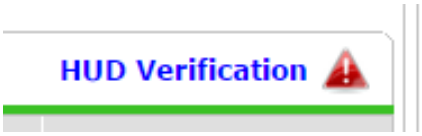


If there are previous entries for Income or Non Cash Benefits that are no longer accurate, do not delete the information. Doing that will cause Data Quality issues for the project that created it.

If changes need to be made, click the pencil to open the subassessment. Put an end date to the old income and then Save and Add the updated income/information. This will maintain the history.

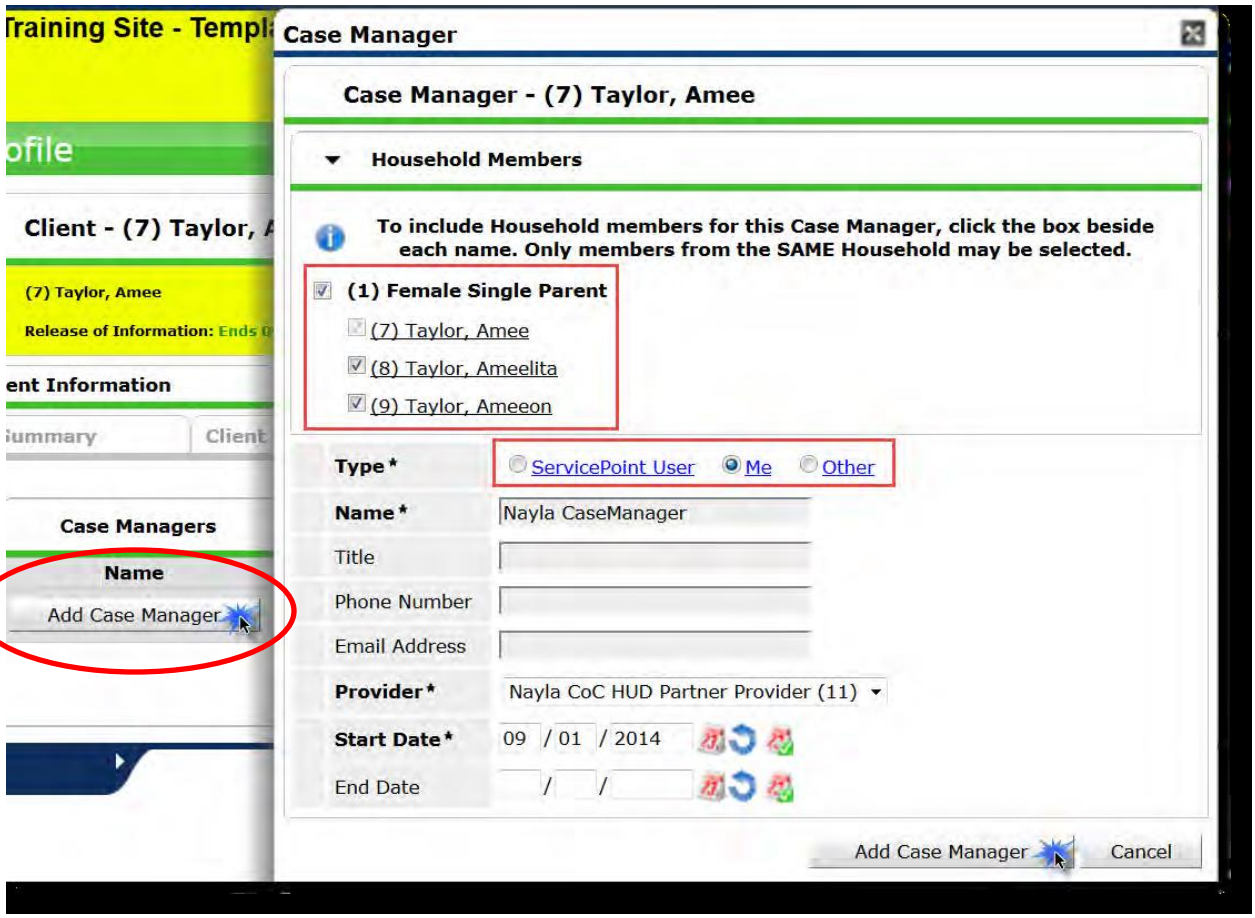
- Once completed, click Save & Exit
- A Green check mark will appear once benefits are all verified next to the HUD Verification link

If the red triangle warning in HUD Verification appears, you have not completed the HUD Verification, and need to click the HUD verification to complete.



It is extremely important that all information is completed and correct on the Entry assessment. This is where ServicePoint looks for information when reports are run. If information is incomplete or incorrect, the reports will be erroneous

Add Case Manager Information Move to the Case Manager Tab and select Add Case Manager and complete the information.

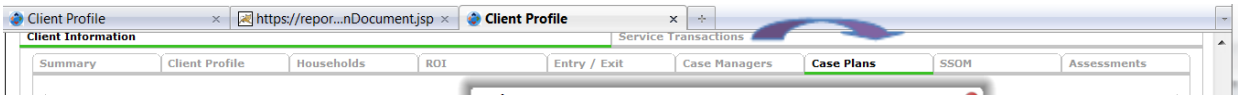


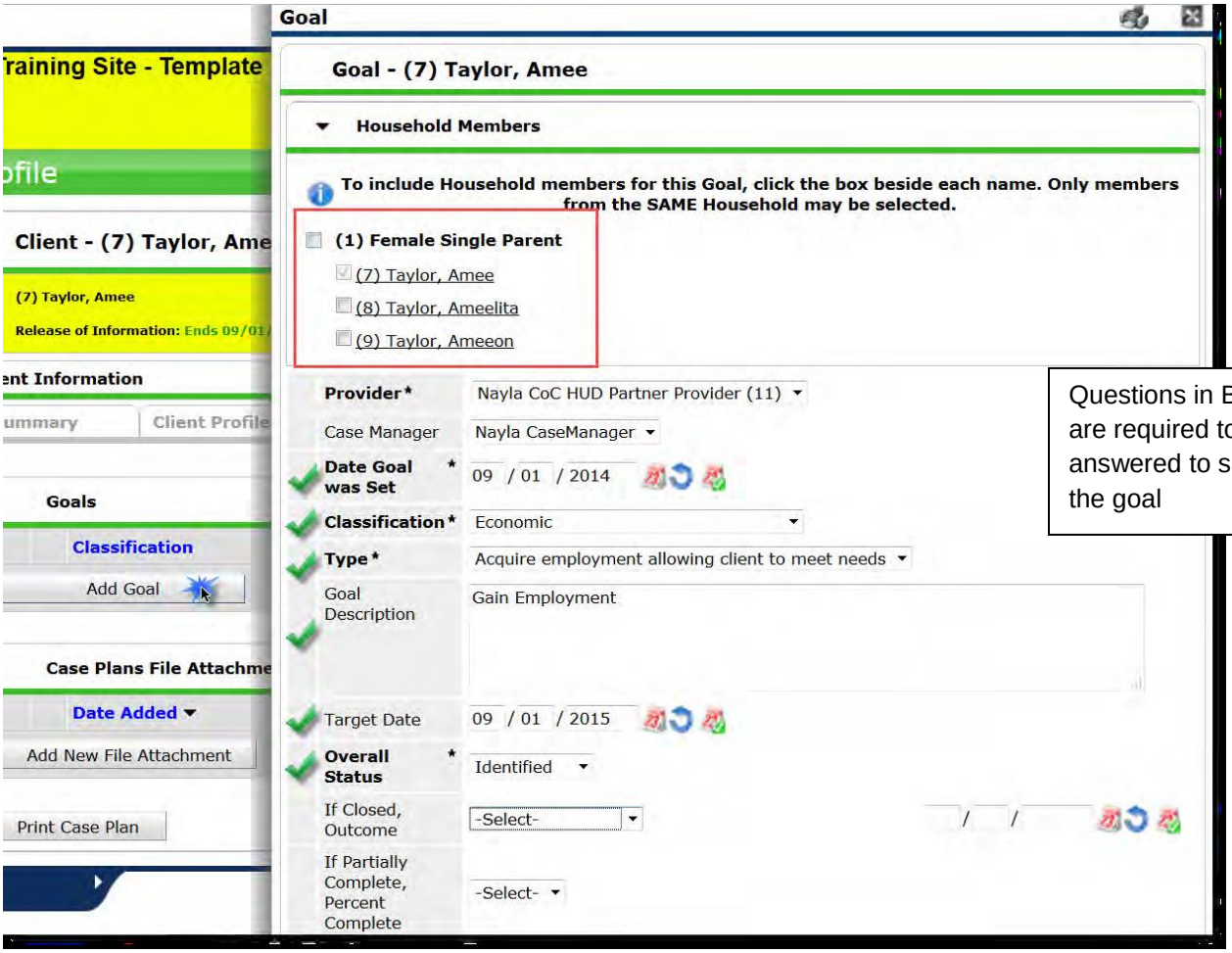
- Click the Case Manager Tab within Client Information
- Click Add Case Manager
- Select household members
- Select the Case Manager:
  - **ServicePoint User -** allows to pick from a dropdown of users for that provider
  - **Me -** will default you (user entering the information)
  - **Other -** will allow manually entered Case Manager information
- Provider will be defaulted to user default provider or provider user is Entering Data As (EDA)
- Click Add Case Manager

Add Case Plan (Optional for projects who desire to Create **Goals**, **Action Steps** and **Case Notes, Print Goals for client signature** to assist clients in planning self sufficiency and track outcomes!)

Move to the Case Plans tab

Click the Case Plans Tab within Client Information
Click Add Goal

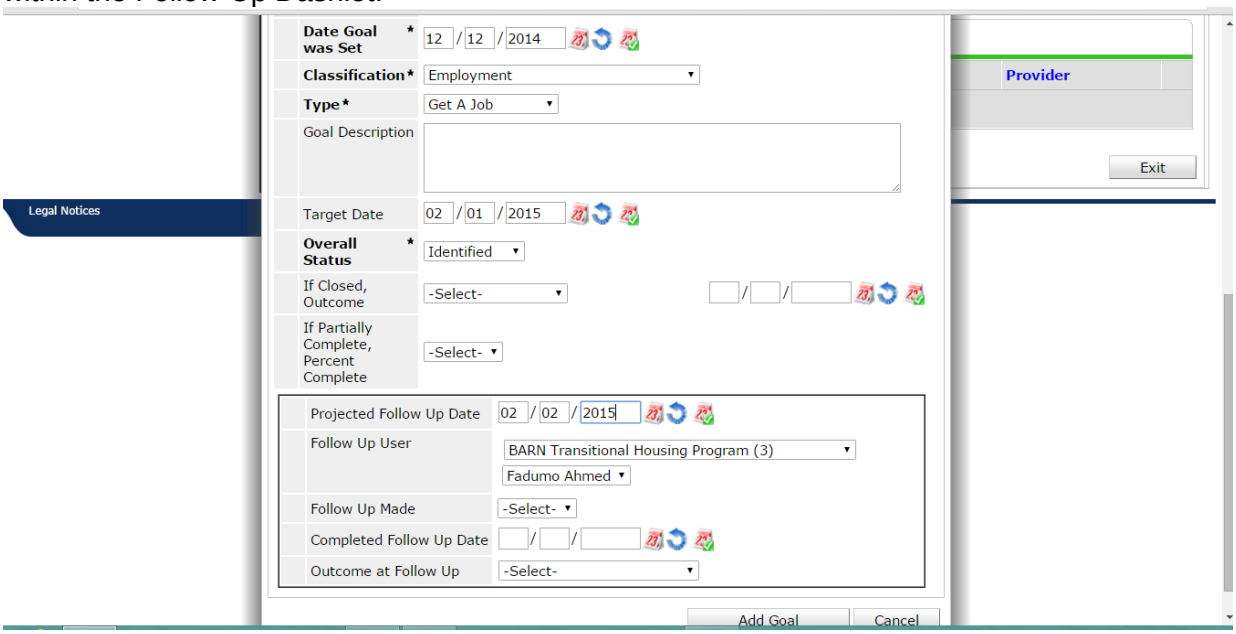




Questions in Bold are required to be answered to save the goal

- Select household members that the Goal applies to
- Date Goal was Set is defaulted to the current System date or Back Date
- Select Classification
- Select Type
- Enter Goal Description
- Select Target Date
- Select Overall Status

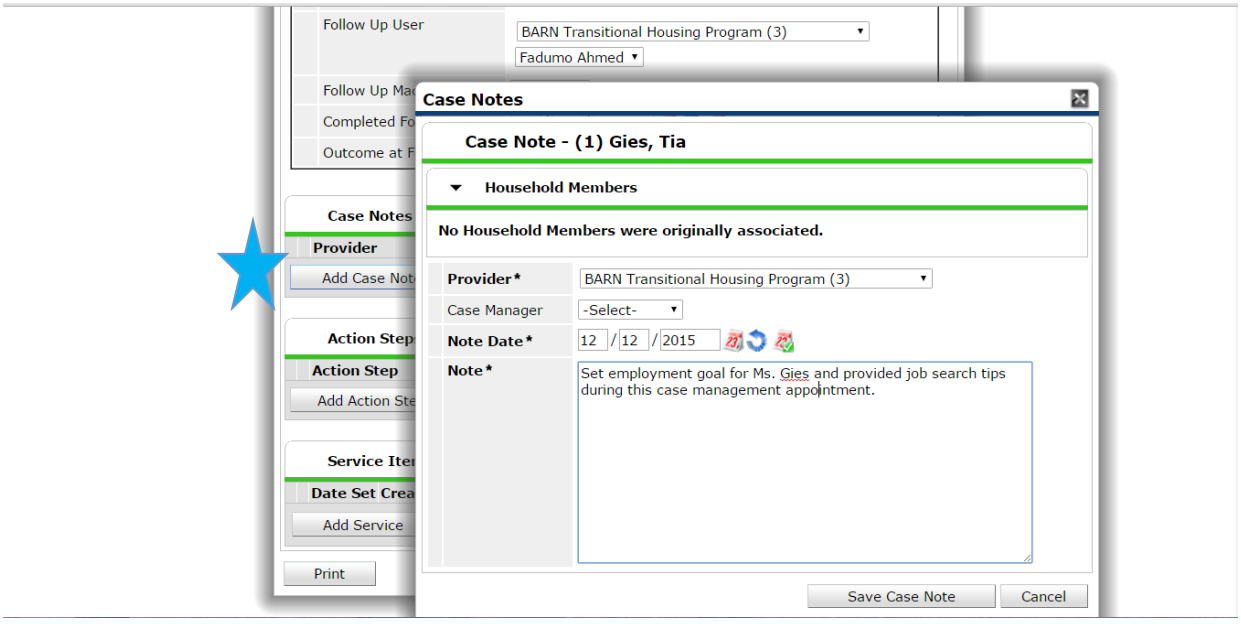
If necessary, create a follow-up. This will create a reminder within the Home Page Dashboard within the Follow-Up Dashlet.



- Assign the date the followup should be done by and the user who should follow up, if necessary.
- Once the follow-up has been made at a later date, the following fields can be answered: Follow Up Made, Completed Follow Up Date, and the Outcome is filled out.

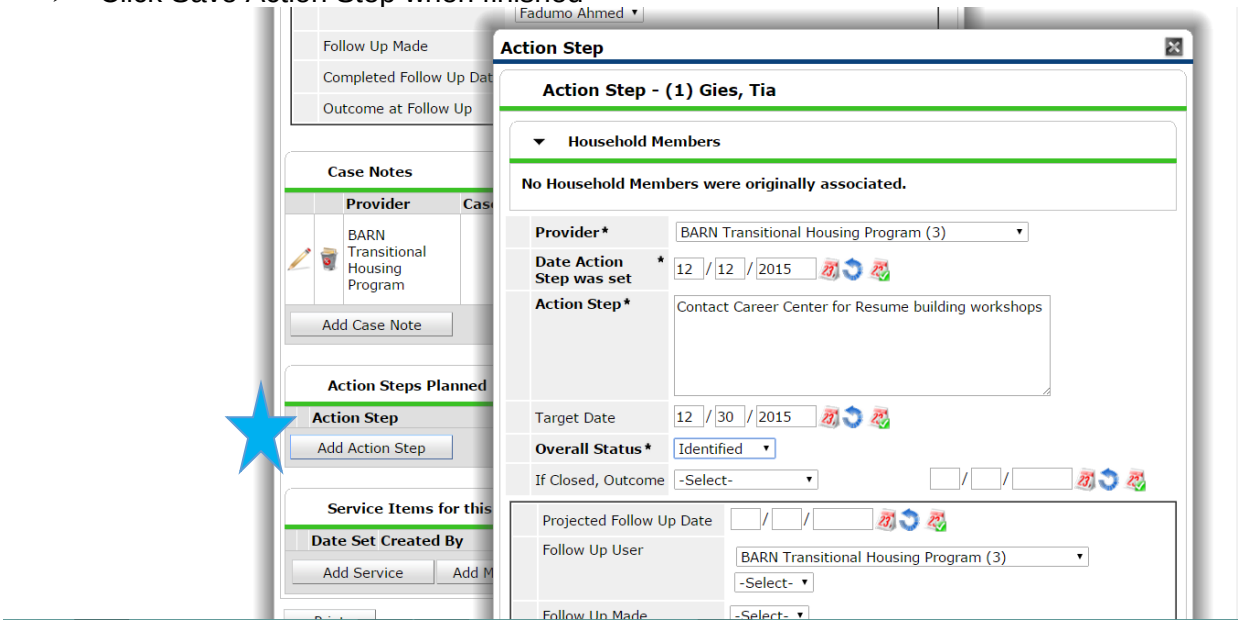
Add Case Notes

- Click Add Case Notes
- Complete Case Notes
- Click Save Case Note when finished



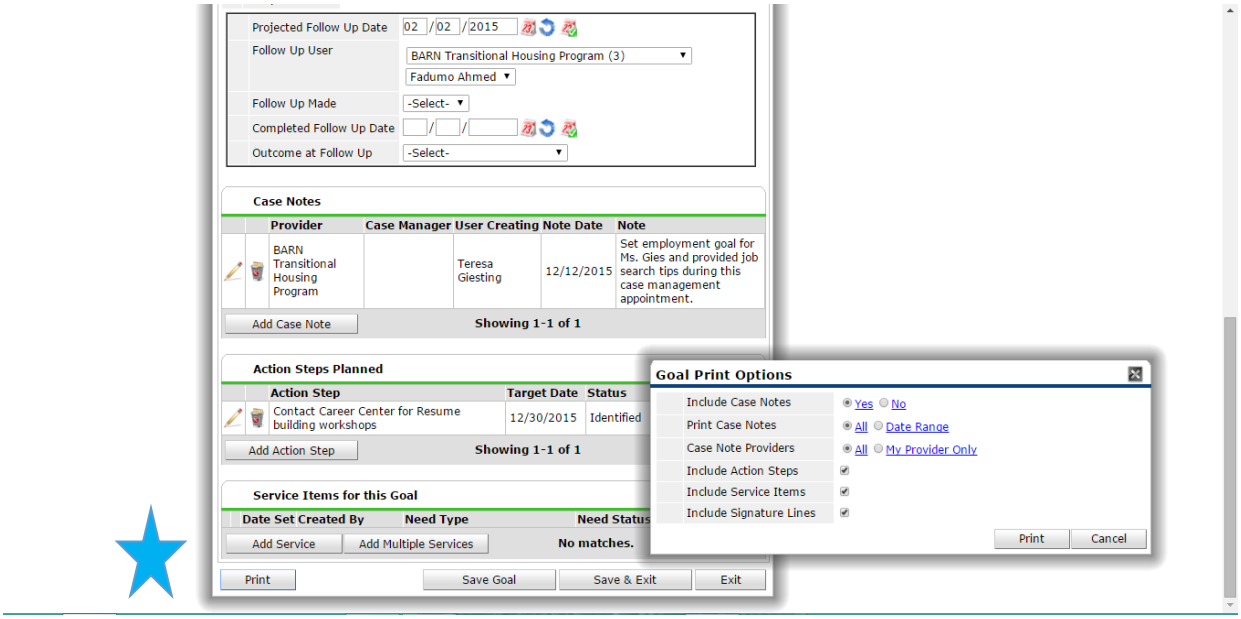
Add Action Plan

- Click Add Action Step
- Complete Action Step Field. This is a free text area so user can be specific.
- Click Save Action Step when finished



Print Case Plans

- Click Print to print the Case Plan for your Client
- Select desired options. Then click Print
- Click Save Goal or
- Click Save & Exit when finished

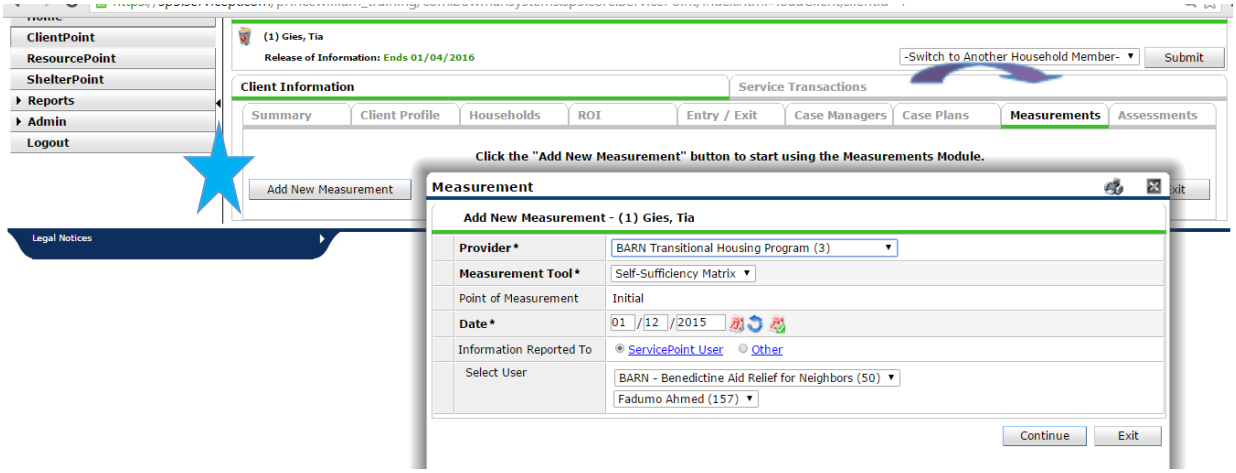


Measurements - Self Sufficiency Outcome Matrix (SSOM)

Case Managers can evaluate their clients at intake, mid program and exit on various life skills/ self-sufficiency measures by using the Measurement Tab. (**HUD loves to see this in case records!!)**

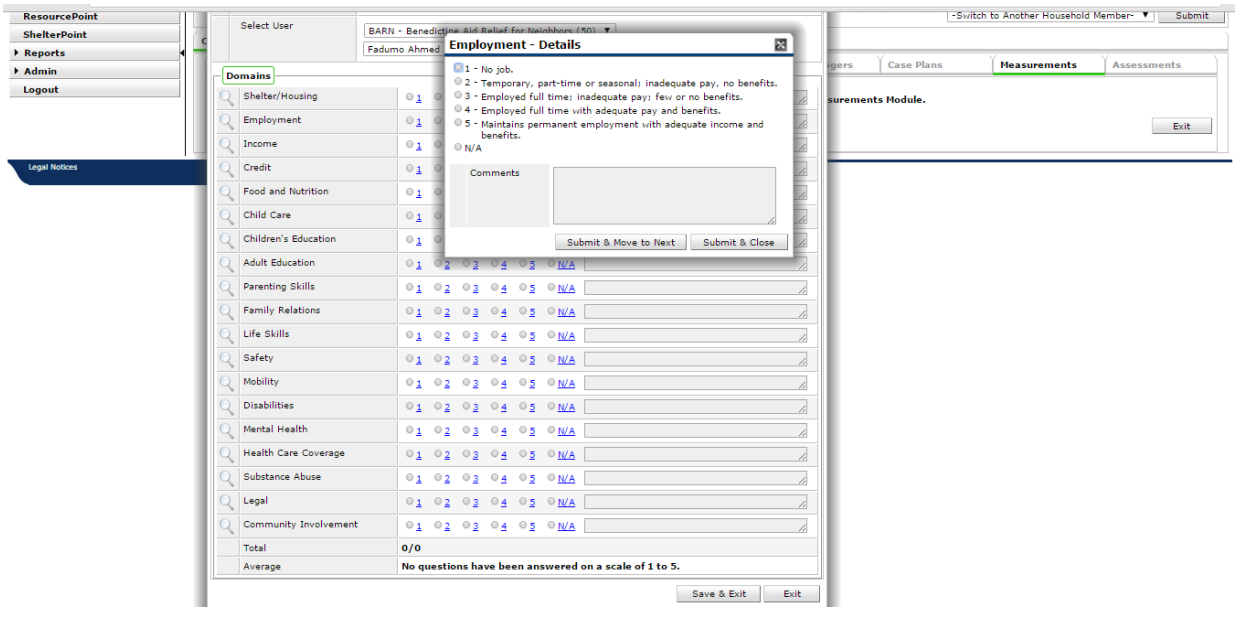
Move to the Measurements Tab

Click Add New Measurement to open the Self Sufficiency Outcome Matrix. Then click Continue to open the SSOM.



Each measure has a 1-5 scale.

Explanation for the scoring can be viewed by clicking the Magnifying Glass next to the Measure



When completed Click Save & Exit

The system will create a score each time the SSOM is completed so client progress can be tracked from Initial Assessment through Followup Assessments.

Assessments Tab

Currently PWA Coordinated Assessments are available on the Assessment Tab for the Coordinated Assessment project.

The Assessments Tab can be used by projects that desire to have additional assessments available to track client information. Contact the System Administrator if additional assessments are needed.

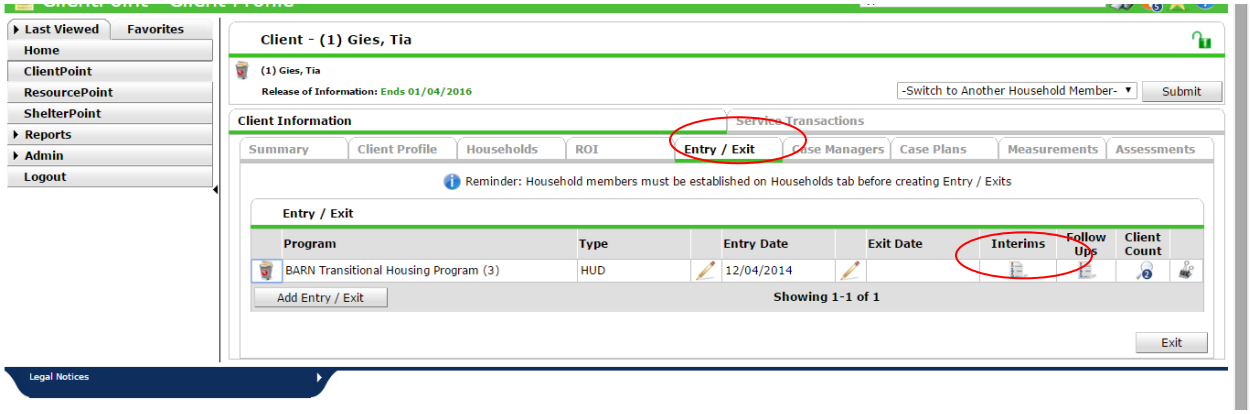
Updating Client Information during Program Stay

Interim Reviews and Annual Assessment

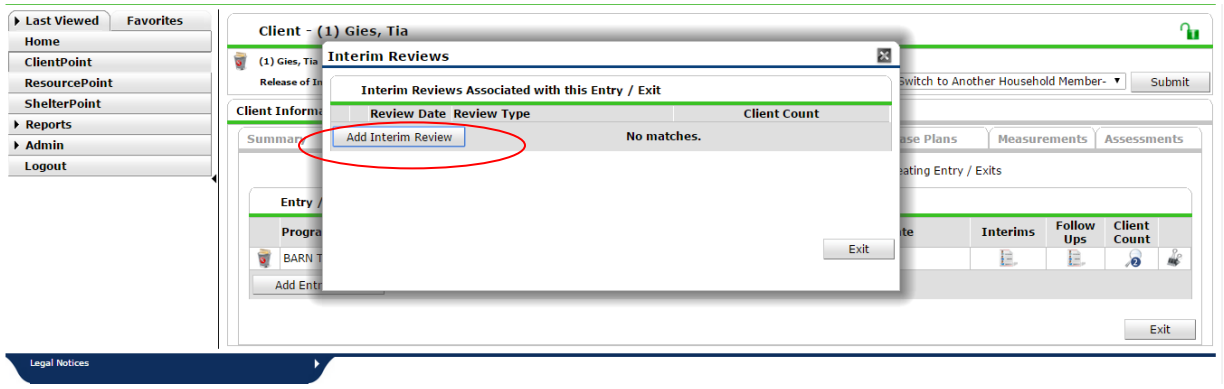
Income sources and amounts, Non Cash Benefits, Health Insurance & Disability should be updated as they change during the client's time in your project. This is especially important for Transitional Housing Projects and mandatory for HUD funded projects that submit an Annual Performance Report (APR) to HUD.

HUD funded projects must perform an Annual Assessment each year within 30 days before or after the *anniversary* of the client's *Project Entry Date,* regardless of the date of the most recent update, and even if the client had no change at all. This must be done for each adult 18 or older. Income associated with Children should be recorded on the Head of Household record, not the child's record.

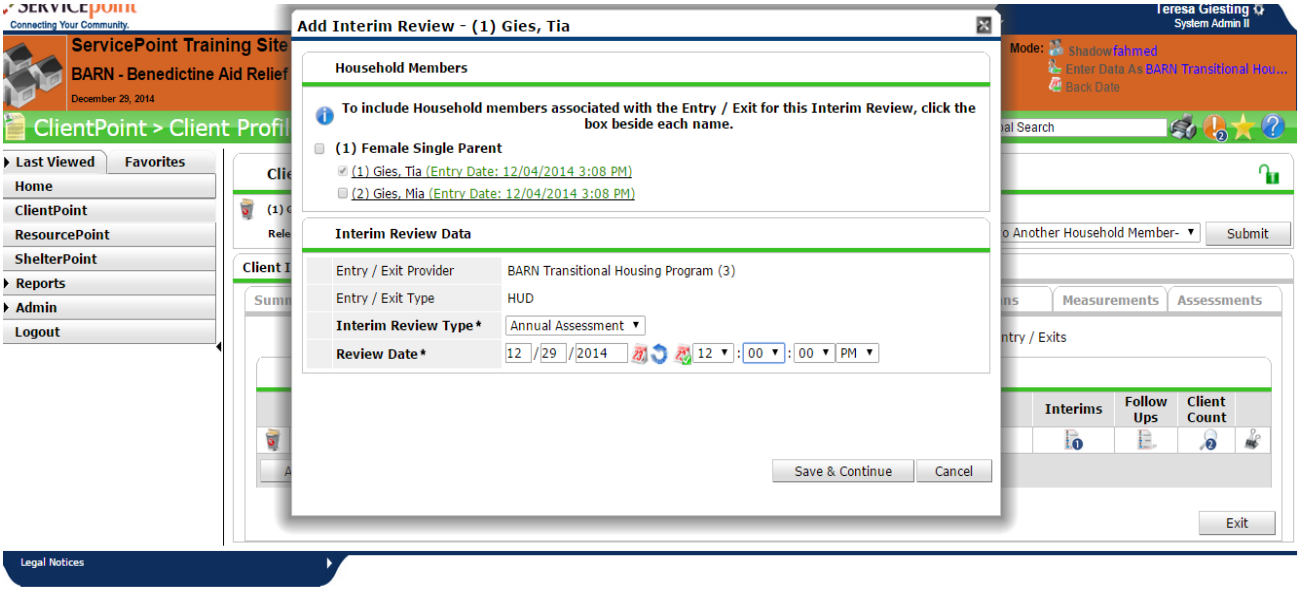
1. Go into "Enter Data As" Mode for Program the client is in
2. You can Backdate to the date you want to reflect the income changes, or skip Backdate and input the Date within the Interim Review assessment
3. Select the client
4. Go to the Entry/Exit tab
5. Click on the Interims icon



6. Click Add Interim Review



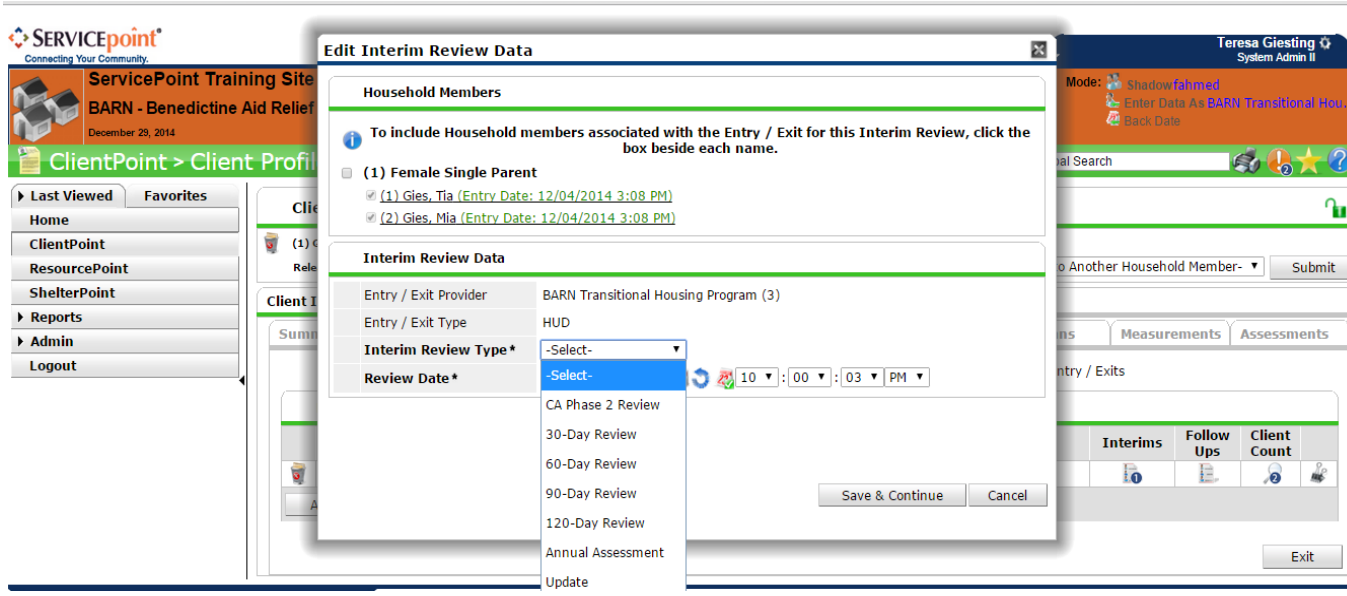
7. Select all household members.



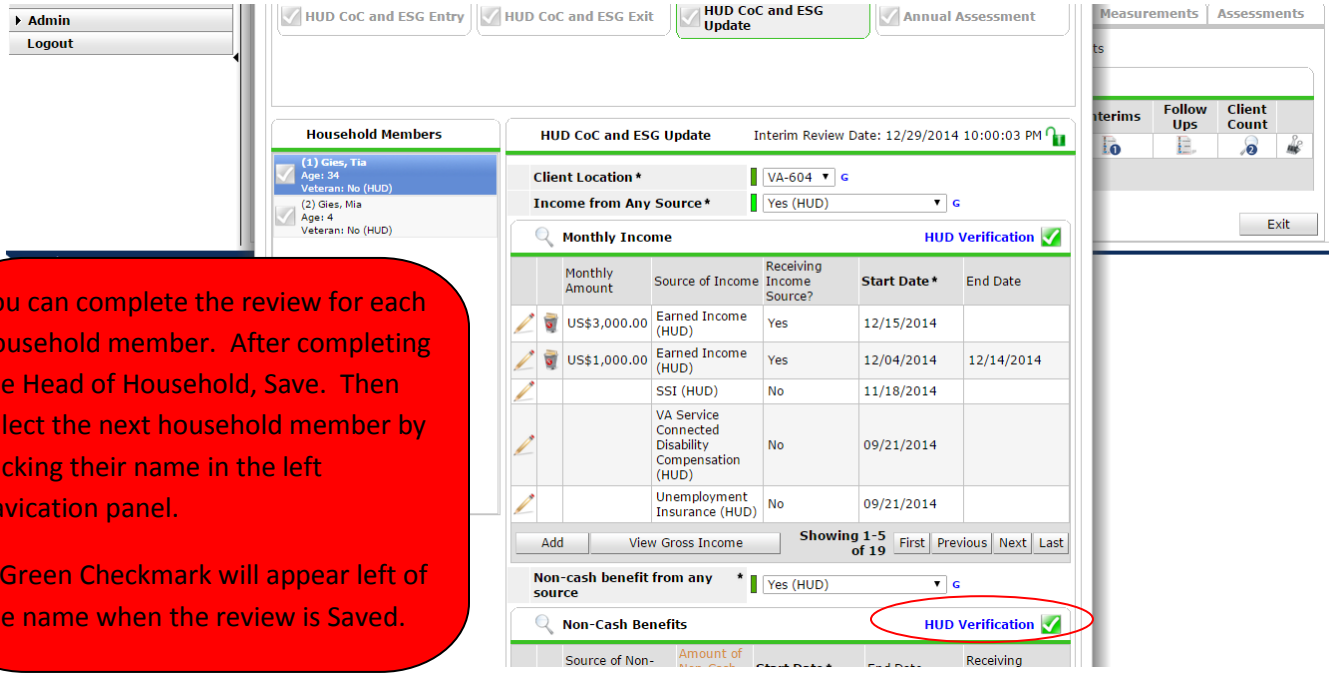
Select the type of Interim Review (30 Day, 60 Day, 90 Day, 120 Day, Annual Assessment or Update) and input the Date the review is to be recorded for in the Review Date fields. Note the Review Date will default to the current date and time if you did not Backdate.

HUD funded programs recording the mandatory Annual Assessment must select "**Annual Assessment**" as the Interim Review Type. <u>If there is no change in the data for the Annual Assessment navigate to the bottom of the assessment and click "Save and Exit". This will record that you have met HUD's requirement to complete an Annual Assessment.</u>

If the review is a 30 Day, 60 Day, 90 Day, 120 Day or Update, make the appropriate selection from the Interim Review Type drop down screen. (Note CA Phase 2 Review is for Coordinated Assessment only).



8. After selecting the appropriate Interim Review Type, answer the questions for Cash Income and Non- Cash Benefits, Medical Insurance, and Disability.



You can complete the review for each household member. After completing the Head of Household, Save. Then select the next household member by clicking their name in the left navication panel.

A Green Checkmark will appear left of the name when the review is Saved.

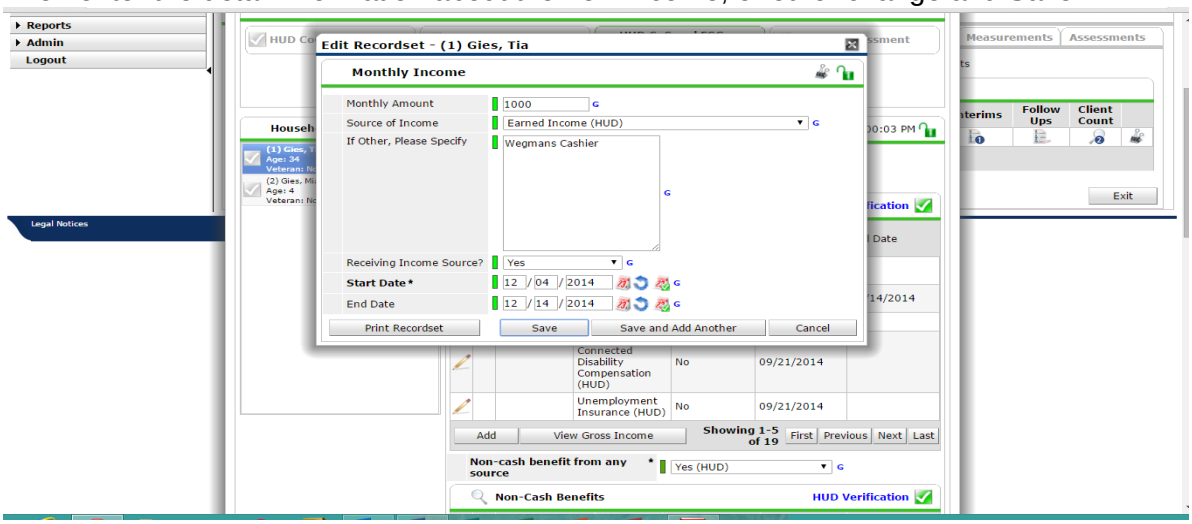
9. Complete the HUD Verification for Cash Income, Non-Cash Benefits, Medical Insurance, and Disability by clicking the blue HUD Verification

   If you answer "Yes" to Income from Any Source, Non-Cash Benefits, Medical Insurance, and Disability Income, then open the sub assessment to complete the detail information on source, amount and date of the change.

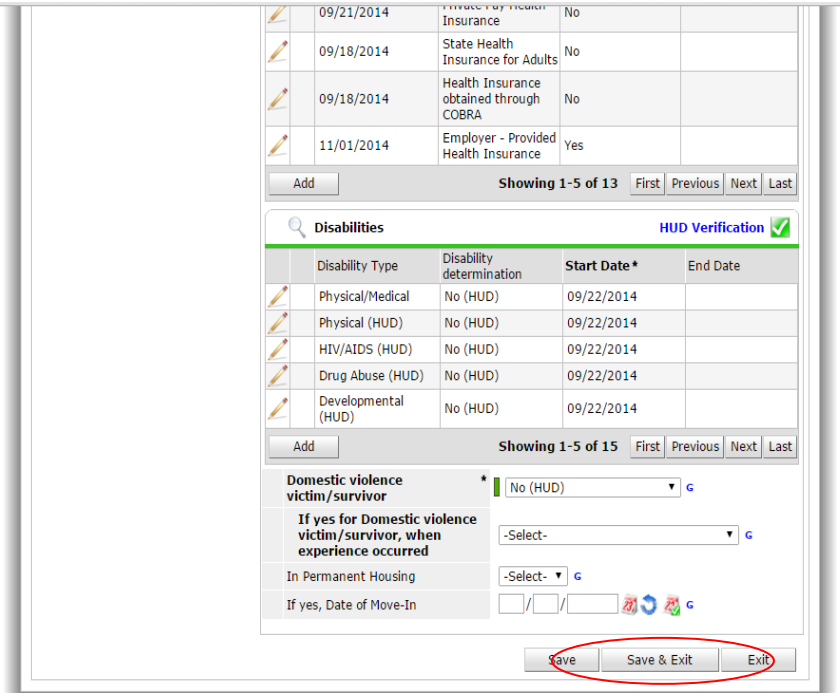
   If the source or amount of Income, Non-Cash Benefits, Medical Insurance or Disability has changed, DO NOT DELETE the old information or income source/amount!! If you delete the old information, the history of the client's changes will be lost. Instead, click the pencil next to the income or other item that has changed to open the

subassessment. Then put an end date to the old income or information, Click Save and Add Another.

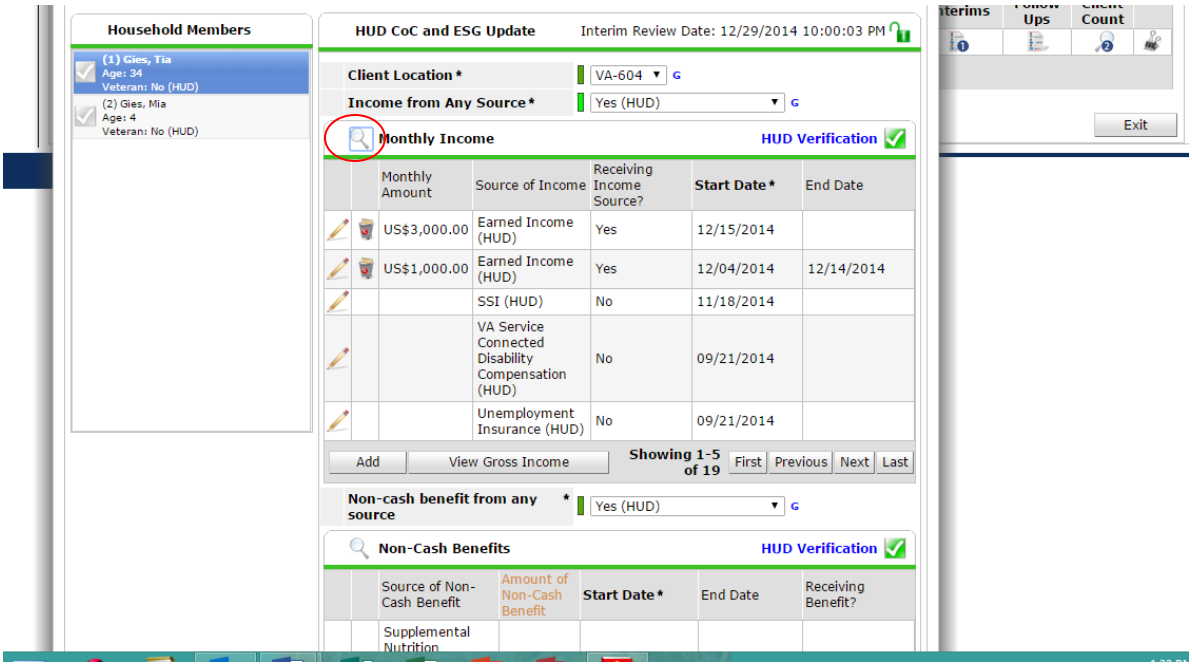
Then enter the detail information about the new income, or other change and Save.



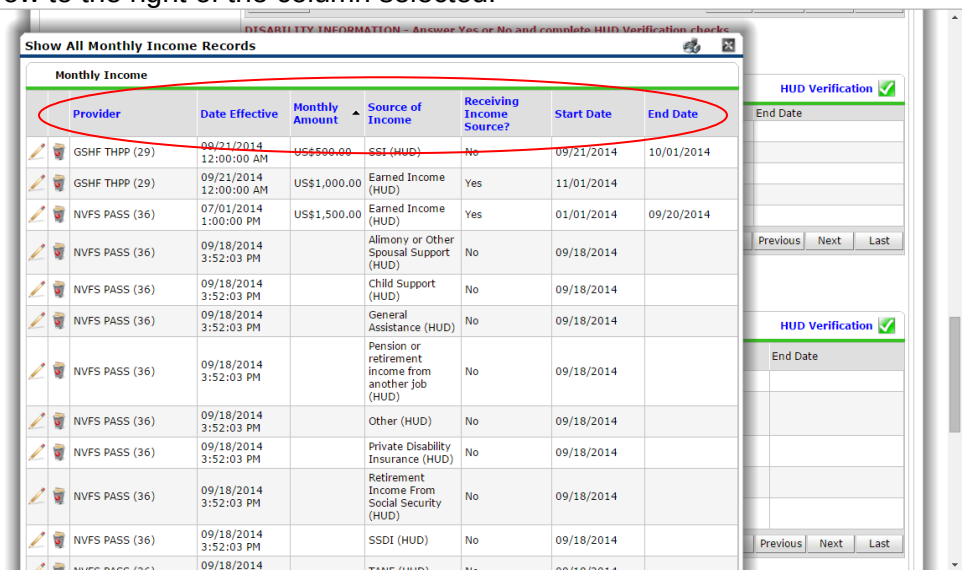
Once you have reviewed all the categories Income, Non-Cash Benefit, Medical Insurance, and Disability, move to the bottom of the Assessment and click Save and Exit to save the entire Review.



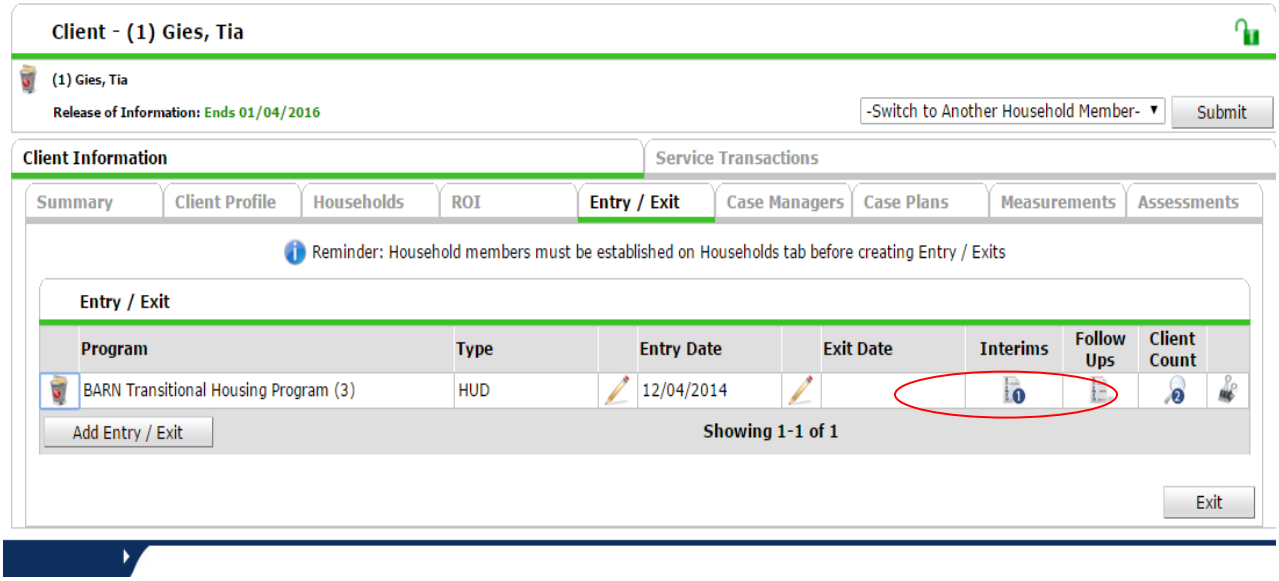
Note: As you work through the Income, Non-Cash Benefit, Medical Insurance and Disability You will notice that only 5 rows of detail history are displayed at one time. You can expand the information by clicking the Magnifying glass next to the Monthly Income, Non-Cash Benefits, Medical Insurance and Disabilty will open the information recorded for the client, and will give you the opportunity to sort information using the eader Row



The Header row can be used to sort data in the columns by clicking on the Blue Heading and black arrow to the right of the column selected.

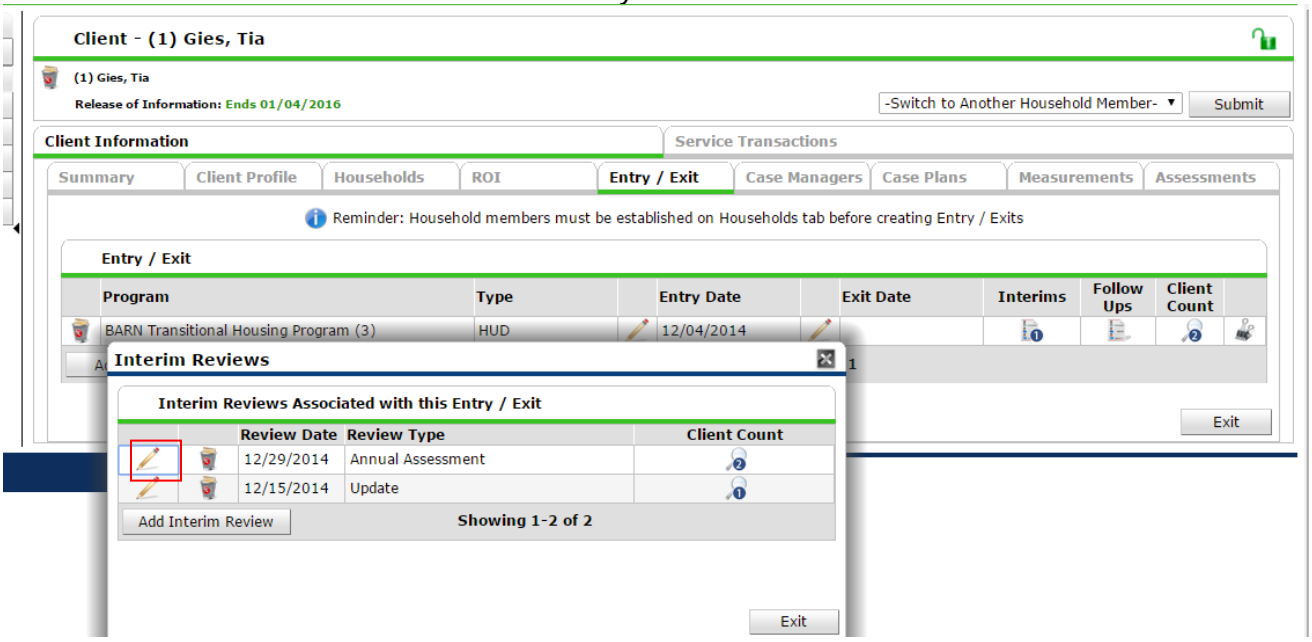


10. Review of the Entry/Exit will show an additional Interim Review in the Interims column. Once the Interim Review Assessment is saved, the number displaying in the Interims column will increase by 1



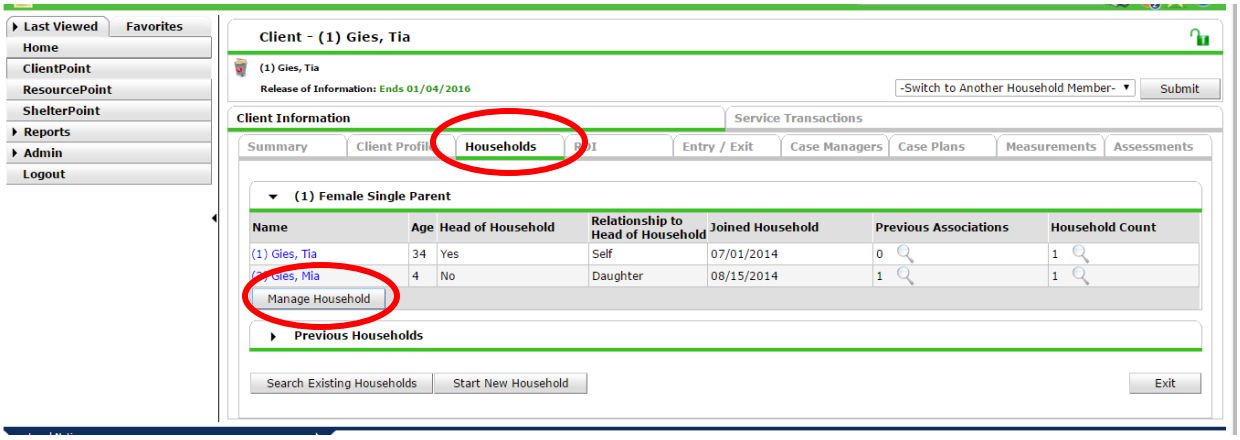
11. Once the Interim Review is created it can be edited as necessary by clicking on the Interims icon. This will bring up the associated Interim Reviews. To make additional edits to the Interim Review click the pencil next to the desired review to navigate to either the Interim Review Data Screen or the Interim Review Assessment, make the needed changes and click “Save and Exit”.

    The Interim Review can also be deleted if created in error by clicking on the Trash Can next to the desired review to delete it from the system

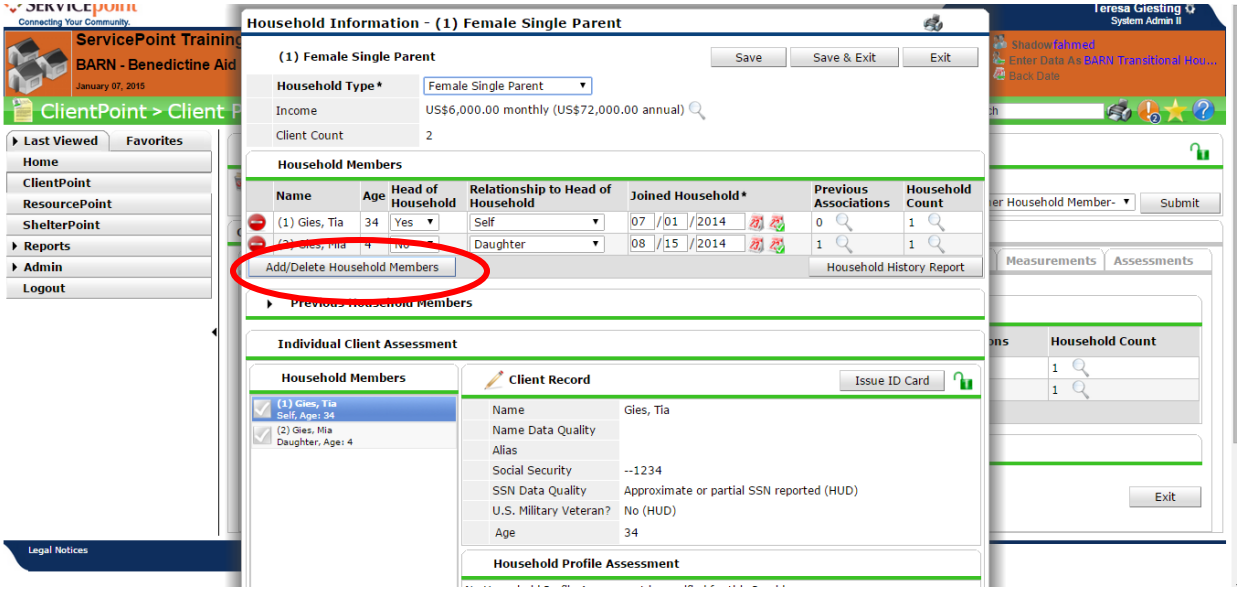


Adding Household members who join the household on a different Entry Date

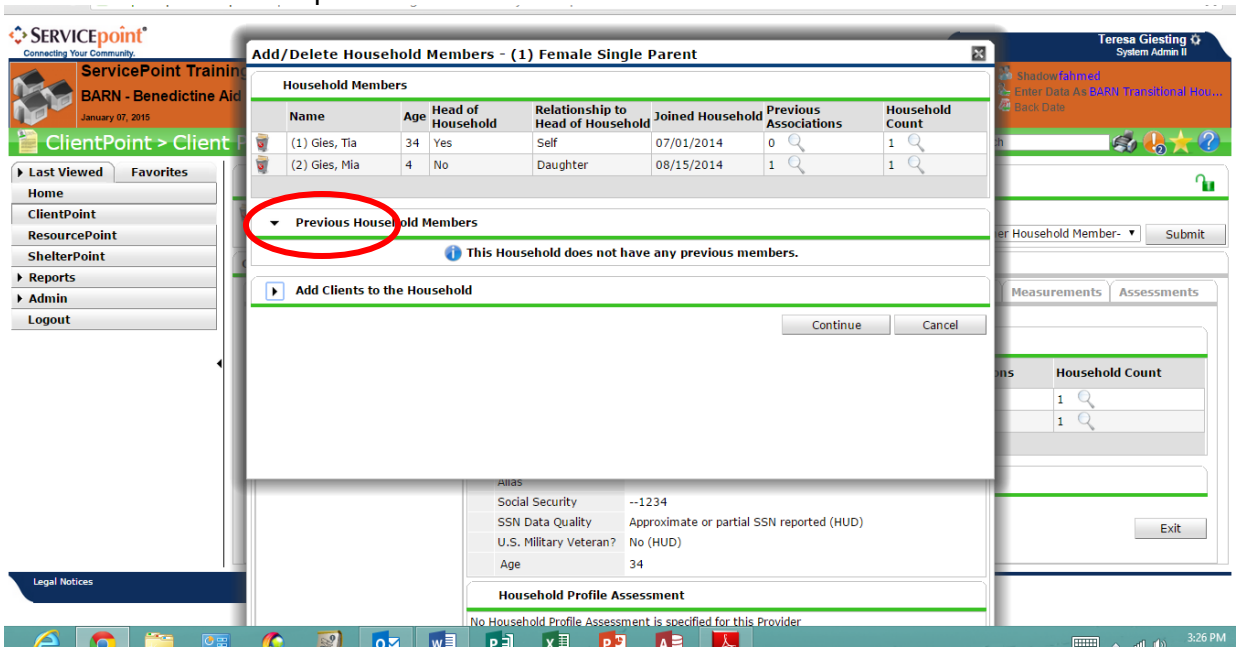
1. Go to the Head of Household Record “Household Tab”



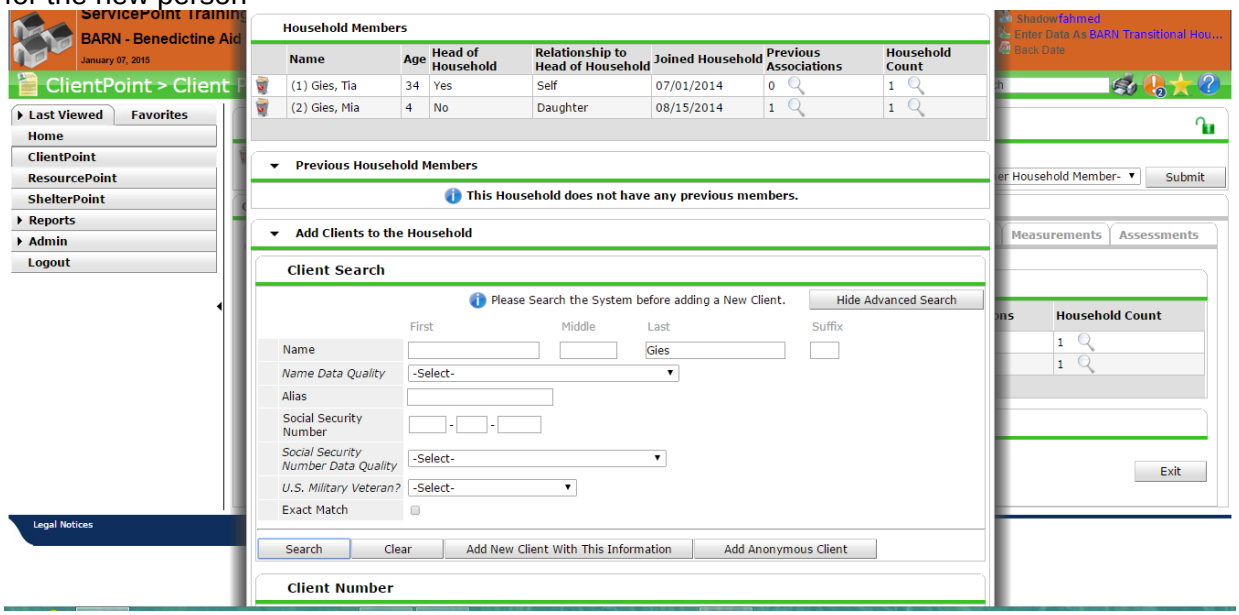
2. Click the Manage Household button
   Click the Add/Delete Household Members button to search for the additional household member



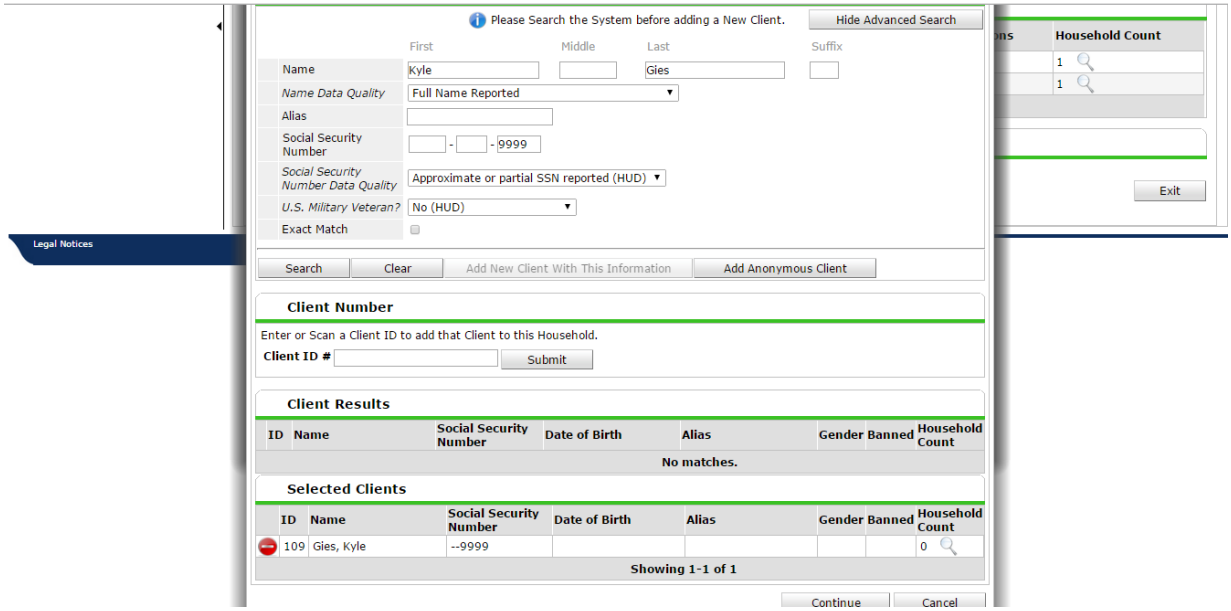
3. When the next screen opens Click the black down arrow left of Add Clients to Household



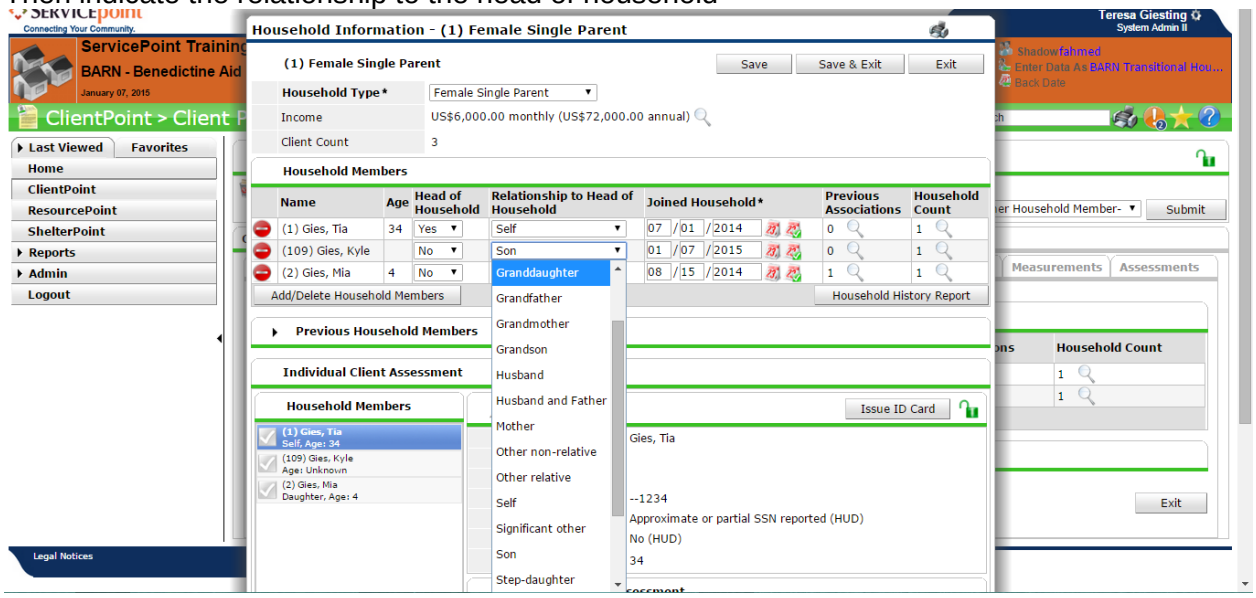
4. Search for the individual to be added. If they are not in the system, Create the Client Profile for the new person



5. After the Name, Name Data Quality, SSN, SSN Data Quality and Veteran Status are added, Click “Add New Client with this Information”.
   You will see the new client at the bottom of the screen.
   Click Continue



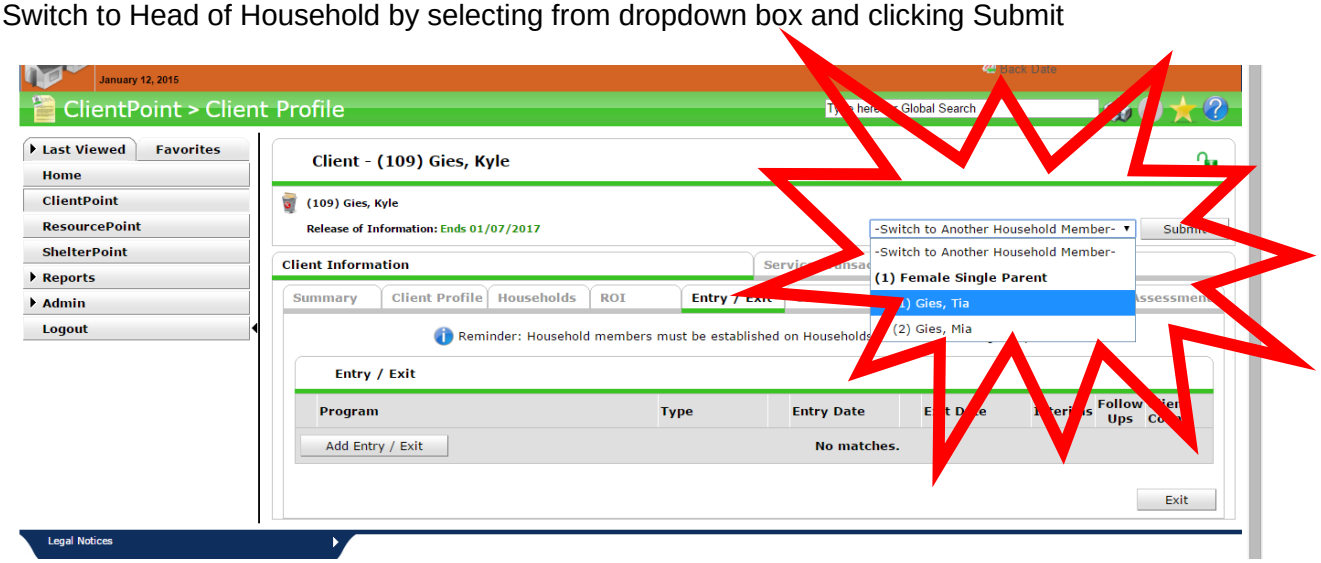
6. Then indicate the relationship to the head of household



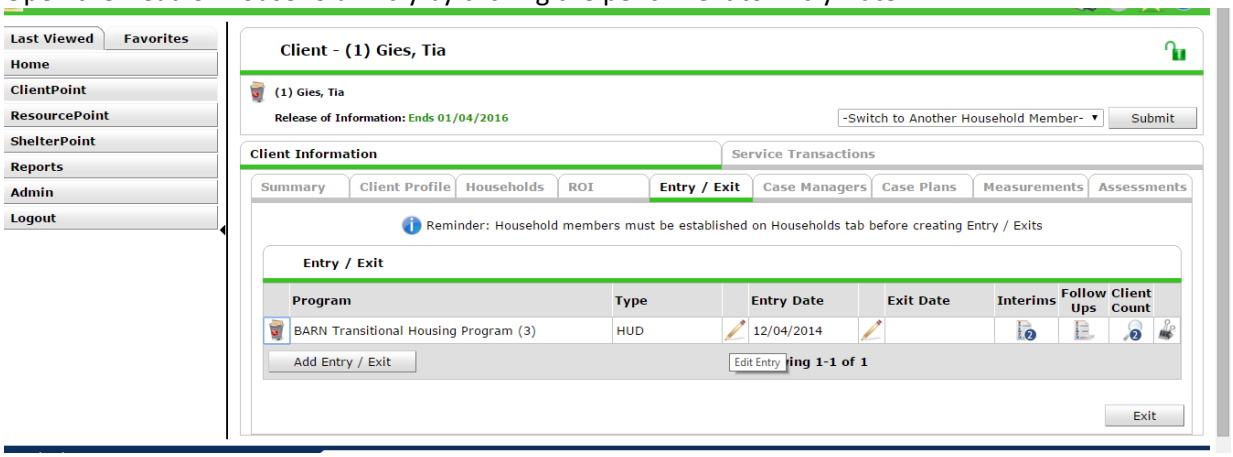
7. Click Save and Exit.

8. Go to the ROI Tab and create the Release of Information for the new household member, Save.

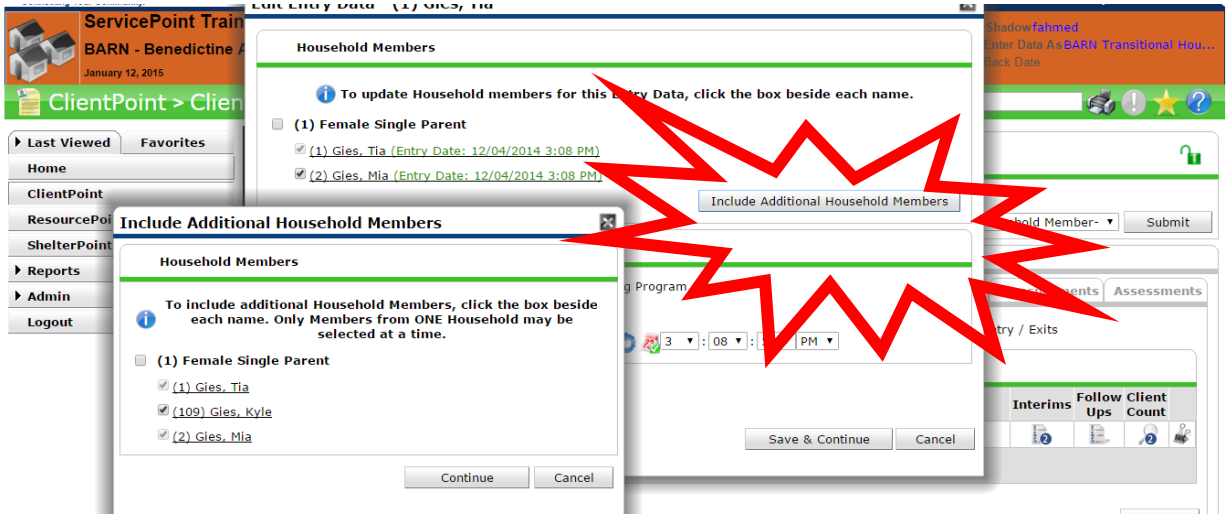
9. Go to the Entry/Exit Tab
   Entry for the new member must be completed through the Head of Household Entry
   Switch to Head of Household by selecting from dropdown box and clicking Submit



10. Open the Head of Household Entry by clicking the pencil next to Entry Date

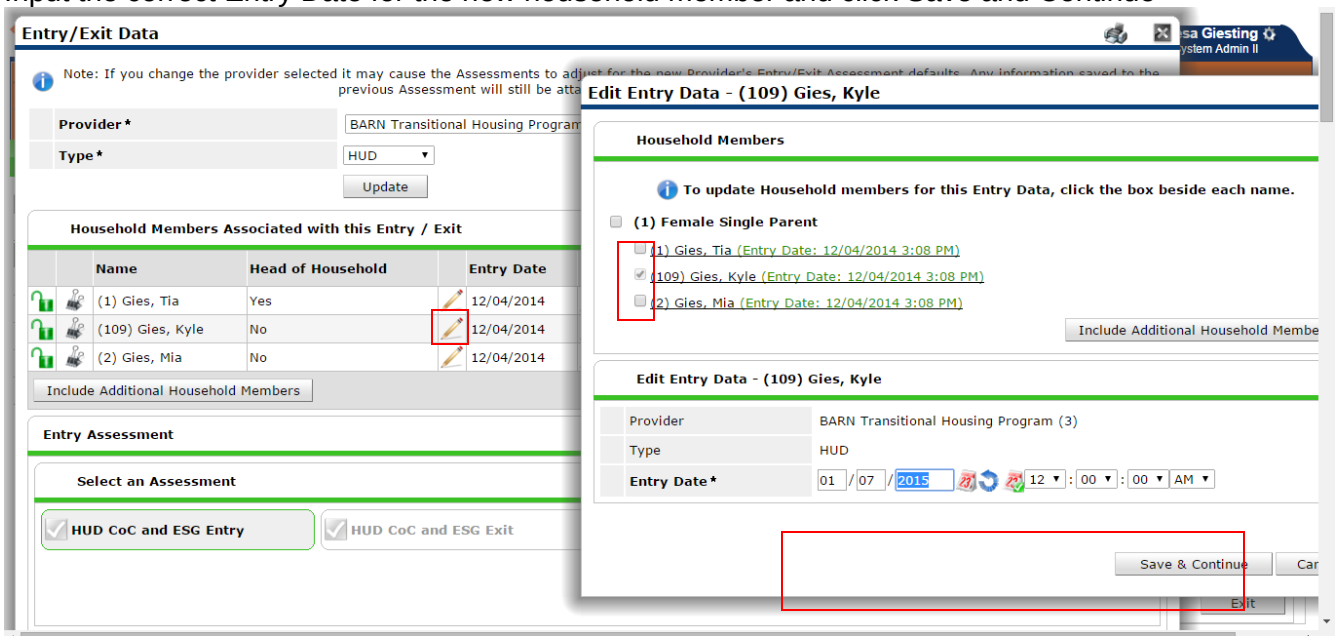


11. When the Entry opens, Click Include Additional Household Members to select the new household member, leaving the original entry date for the other household members. Click Continue

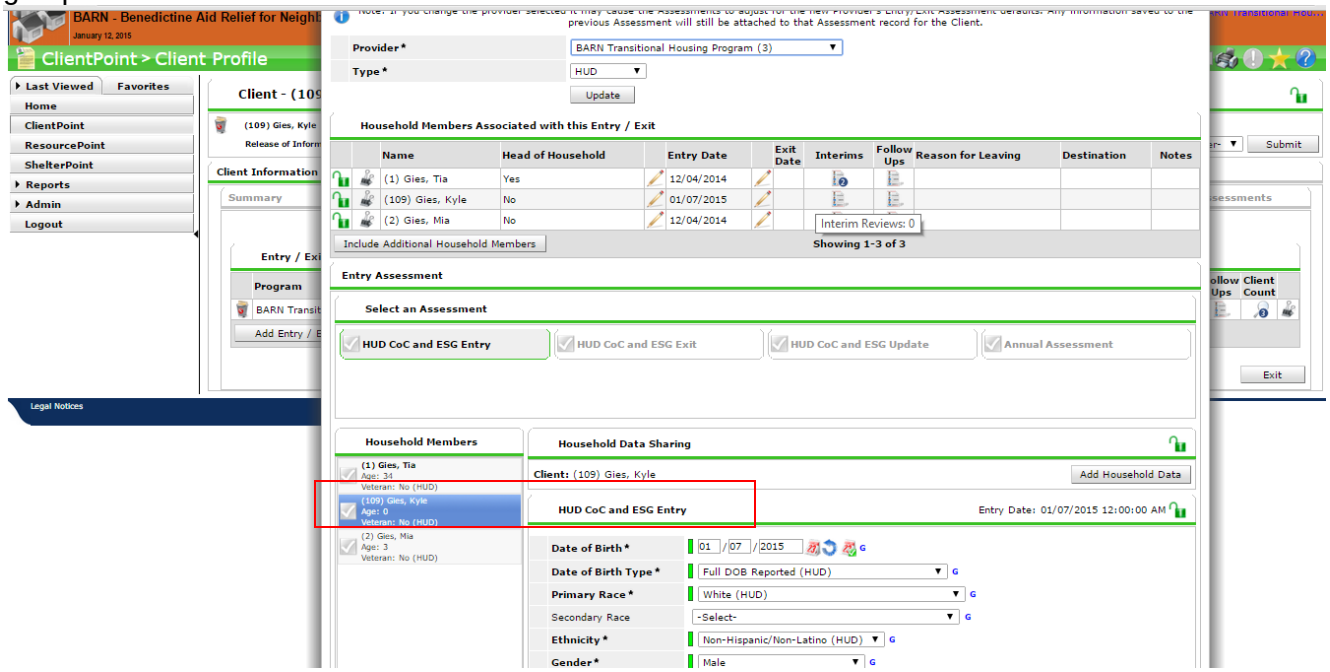

Household Members
To update Household members for this Entry Data, click the box beside each name.
(1) Female Single Parent
(1) Gies, Tia (Entry Date: 12/04/2014 3:08 PM)
(2) Gies, Mia (Entry Date: 12/04/2014 3:08 PM)
Include Additional Household Members
Include Additional Household Members
Household Members
To include additional Household Members, click the box beside each name. Only Members from ONE Household may be selected at a time.
(1) Female Single Parent
(1) Gies, Tia
(109) Gies, Kyle
(2) Gies, Mia
Continue
Cancel
Save & Continue
Cancel

12. When the next box opens, click Save and Continue

13. Click the pencil next to the new household member Entry to open it
    Uncheck the boxes next to the original household members to retain their original entry date
    Input the correct Entry Date for the new household member and click Save and Continue



    The new person will have their own entry date, and also be included in the proper household group.



14. Complete the data in the HUD CoC and ESG Entry Assessment by clicking on the new household member from the left Household Members navigation panel (including DOB, DOB type, HUD verifications, etc.)

15. To include the new member in the ShelterPoint Bed entry, go to ShelterPoint bed list
    Select the Head of Household
    Click Add Additional Household Member
    Check the new HH member and enter <u>their correct date of entry</u>, assign a bed, save

If you do not complete the new household member Entry through the head of household's Entry, the person will not be included in the household, children would report as unaccompanied youth, and reporting will be incorrect.

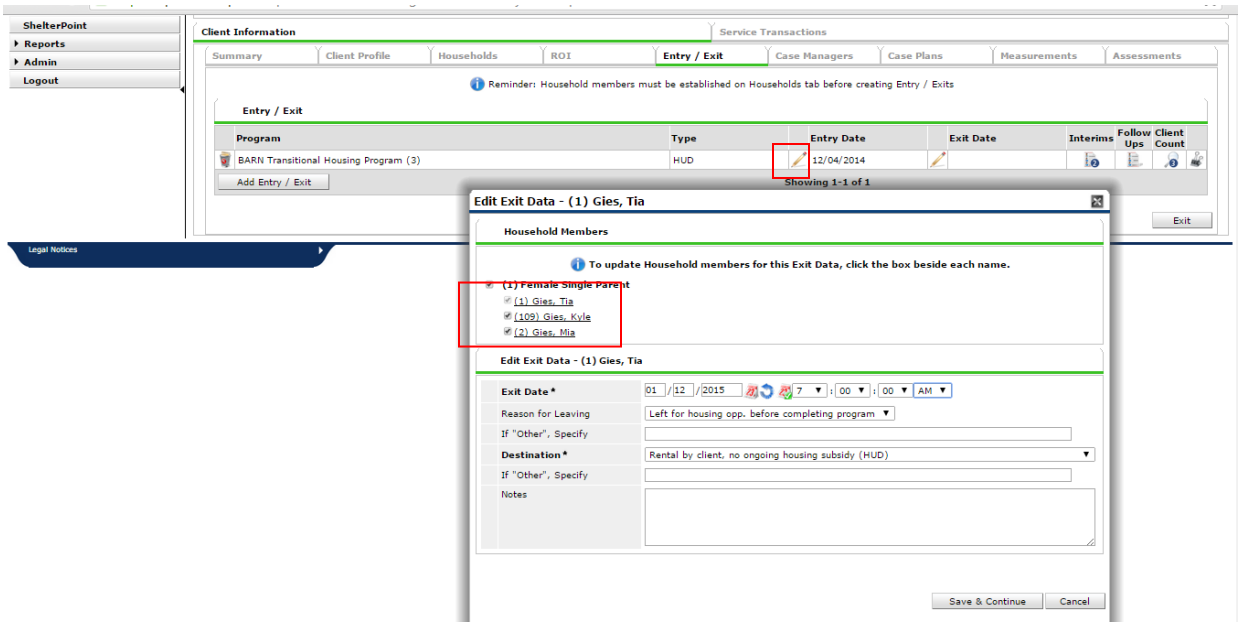
It is extremely important to follow these instructions when adding additional household members with a different entry date (i.e. Newborn)

Exiting Clients from the Program

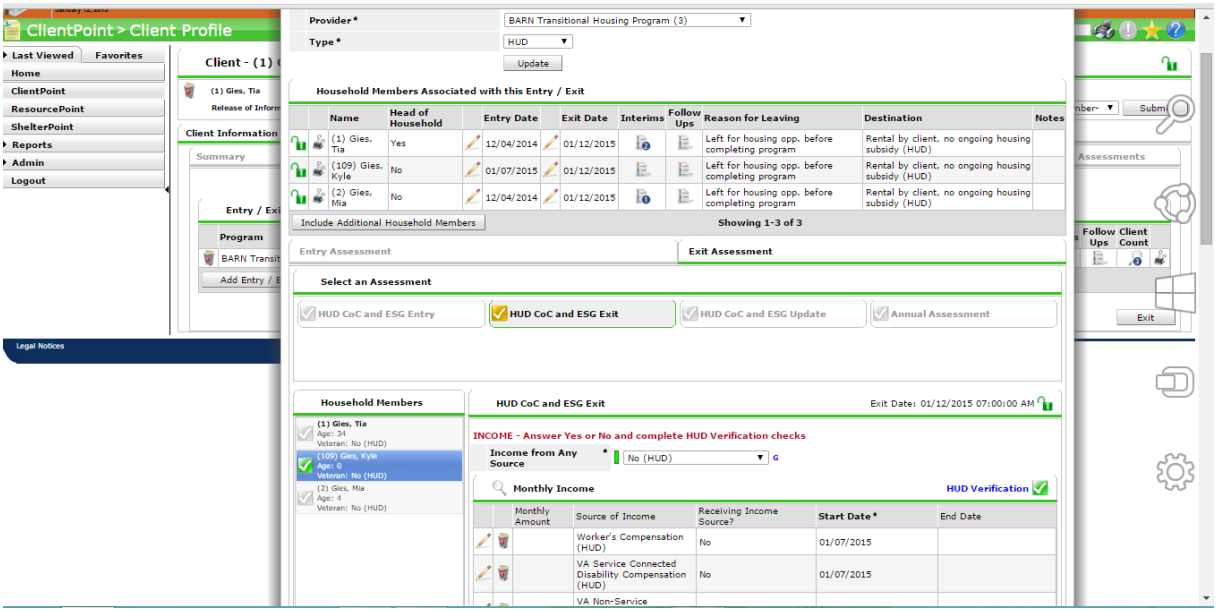
Clients must be exited from <u>both</u> ClientPoint and Shelter Point. (Except Winter Shelter where workflow is set tocomplete both Entry and Exit through ShelterPoint)

ClientPoint Exit

1. Before creating an Exit for your client, ensure that all Service Transactions, Measurements and Case Plans are marked Completed and Closed.
2. End Case Manager relationship by adding an End Date
3. Backdate to the date of exit
4. Go to the Entry/Exit Tab
5. Click the pencil next to the Exit to open the Exit
6. Include all household members in the exit
7. Enter the date your client exited the program (if you have Backdated to the date of exit, the date will populate as the Exit Date)
8. Complete Reason for Leaving, Destination, and all information on the Exit screen, including HUD Verifications for Monthly Income, Non Cash Benefits, Insurance and Disability as they exists at the time of exit from your program. This information is used as a measure of client's success in the program
9. Save

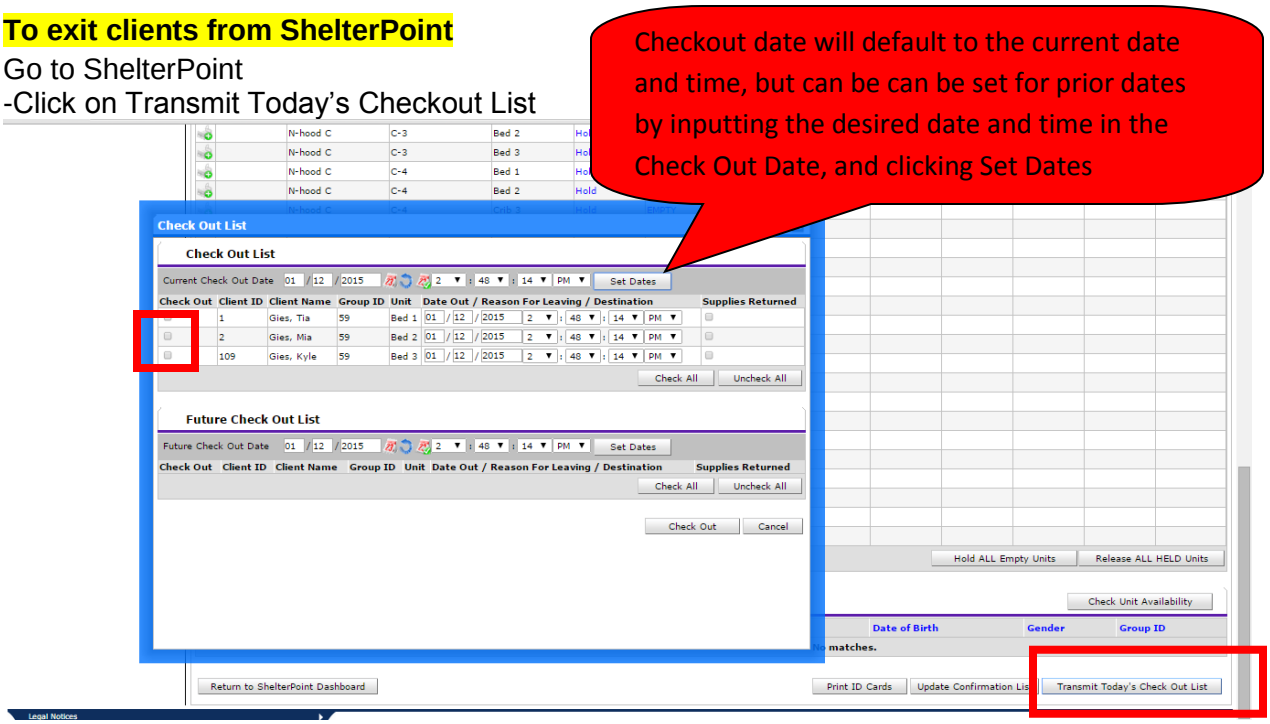


10. Complete Exit Assessment information for all clients in the household. Move through the household members from the left Household Members navigation panel.
    Green check marks will appear when each client is saved
    Click Save to move to the next household member.
    When all household members have been completed, Click Save & Exit



To exit clients from ShelterPoint

Go to ShelterPoint
-Click on Transmit Today's Checkout List

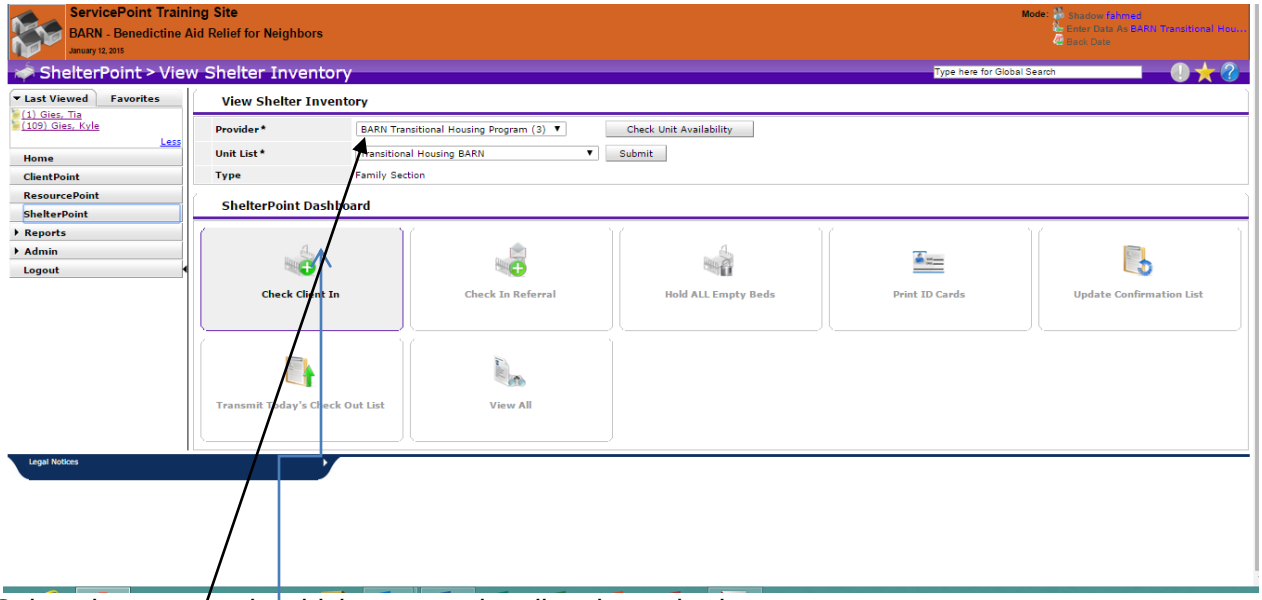

Checkout date will default to the current date and time, but can be can be set for prior dates by inputting the desired date and time in the Check Out Date, and clicking Set Dates
Check Out List
Check Out List
Current Check Out Date
Set Dates
Check Out
Client ID
Client Name
Group ID
Unit
Date Out / Reason For Leaving / Destination
Supplies Returned
Check All
Uncheck All
Future Check Out List
Future Check Out Date
Check Out
Cancel
Hold ALL Empty Units
Release ALL HELD Units
Check Unit Availability
Date of Birth
Gender
Group ID
Return to ShelterPoint Dashboard
Print ID Cards
Update Confirmation List
Transmit Today's Check Out List

-Select the clients to exit
-Select the checkout date based on the morning following the last night they spent in the program/shelter. (Example: If client spent the night of June 30, the exit is July 1. As a standard practice, set the time of exit from the Shelter bed at 7 a.m. **The computer defaults to the current date and time when you open the Transmit Today's Checkout List, so remember to select the correct date they left, or your bed night report will be wrong!**
-Click the Check Out button to complete the checkout

ShelterPoint Bed Entry

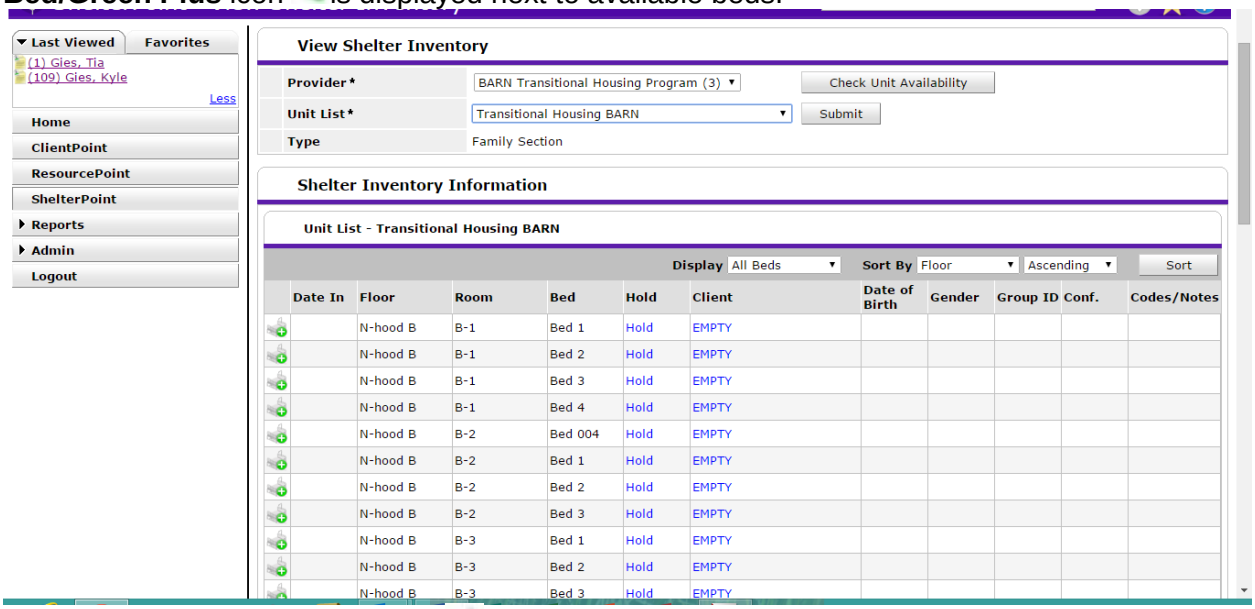
Click Check Client In from the Dashboard which opens up the bedlist.
Emergency Shelters, Transitional Housing and Permanent Supportive Housing programs use ShelterPoint to manage entry/exits into shelter beds.

1. Select ShelterPoint from the left module selection



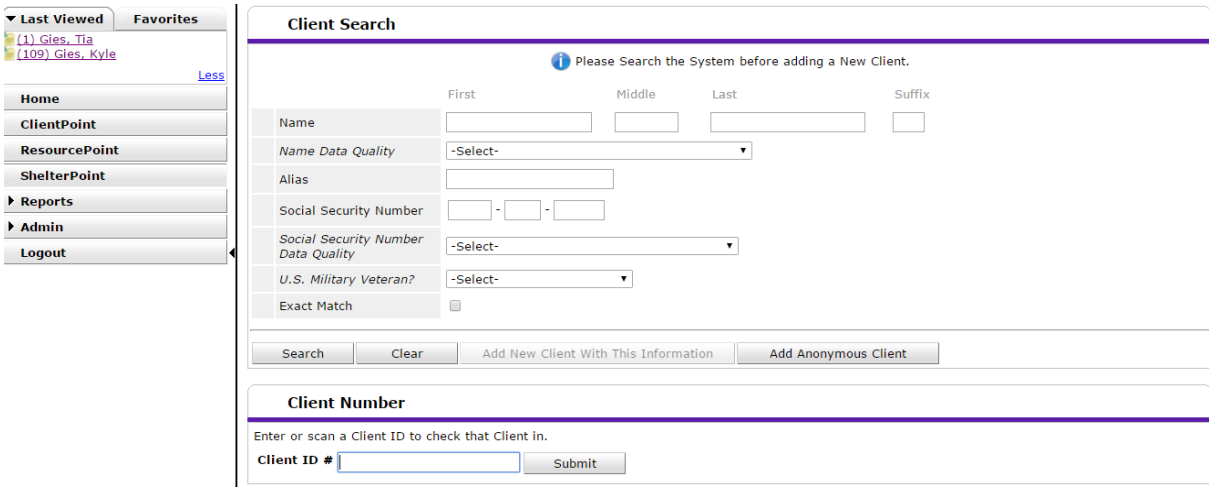
2. Select the program in which to enter the client into a bed
3. Click Check Client In from the Dashboard which opens up the bedlist

In **Shelter Inventory Information – Unit List** the bed list is displayed. (1) The **Bed/Green Plus** icon is displayed next to available beds.

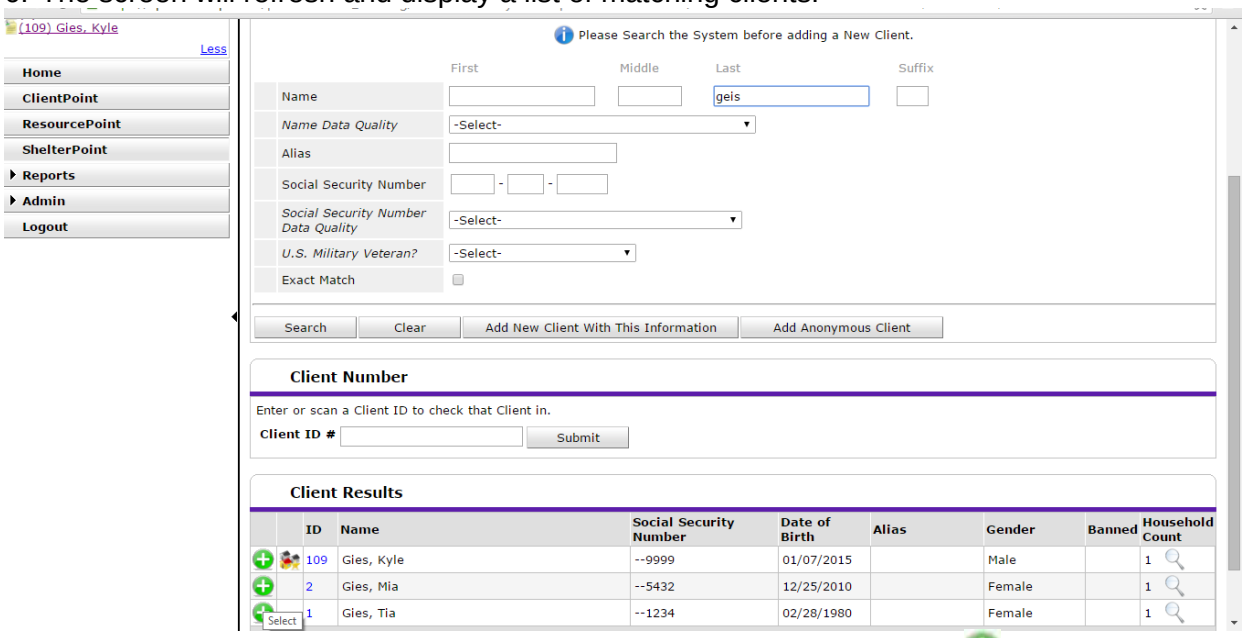

Last Viewed
Favorites
(1) Gies, Tia
(109) Gies, Kyle
Less
Home
ClientPoint
ResourcePoint
ShelterPoint
Reports
Admin
Logout
View Shelter Inventory
Provider*
BARN Transitional Housing Program (3)
Check Unit Availability
Unit List*
Transitional Housing BARN
Submit
Type
Family Section
Shelter Inventory Information
Unit List - Transitional Housing BARN
Display All Beds
Sort By Floor Ascending
Sort
Date In | Floor | Room | Bed | Hold | Client | Date of Birth | Gender | Group ID | Conf. | Codes/Notes
N-hood B | B-1 | Bed 1 | Hold | EMPTY
N-hood B | B-1 | Bed 2 | Hold | EMPTY
N-hood B | B-1 | Bed 3 | Hold | EMPTY
N-hood B | B-1 | Bed 4 | Hold | EMPTY
N-hood B | B-2 | Bed 004 | Hold | EMPTY
N-hood B | B-2 | Bed 1 | Hold | EMPTY
N-hood B | B-2 | Bed 2 | Hold | EMPTY
N-hood B | B-2 | Bed 3 | Hold | EMPTY
N-hood B | B-3 | Bed 1 | Hold | EMPTY
N-hood B | B-3 | Bed 2 | Hold | EMPTY
N-hood B | B-3 | Bed 3 | Hold | EMPTY

4. Click the Bed/**Green Plus** icon (1) or the **Empty** hyperlink (2) to assign a client to a bed. The **Client Search** window will display. (See Figure 1-25)

5. In **Client Search**, search by client's name or Client ID, click Submit



6. The screen will refresh and display a list of matching clients.



7. When the client is located in **Client Results**, click the **Green Plus** icon next to client's **Name** to assign the client to the selected bed.

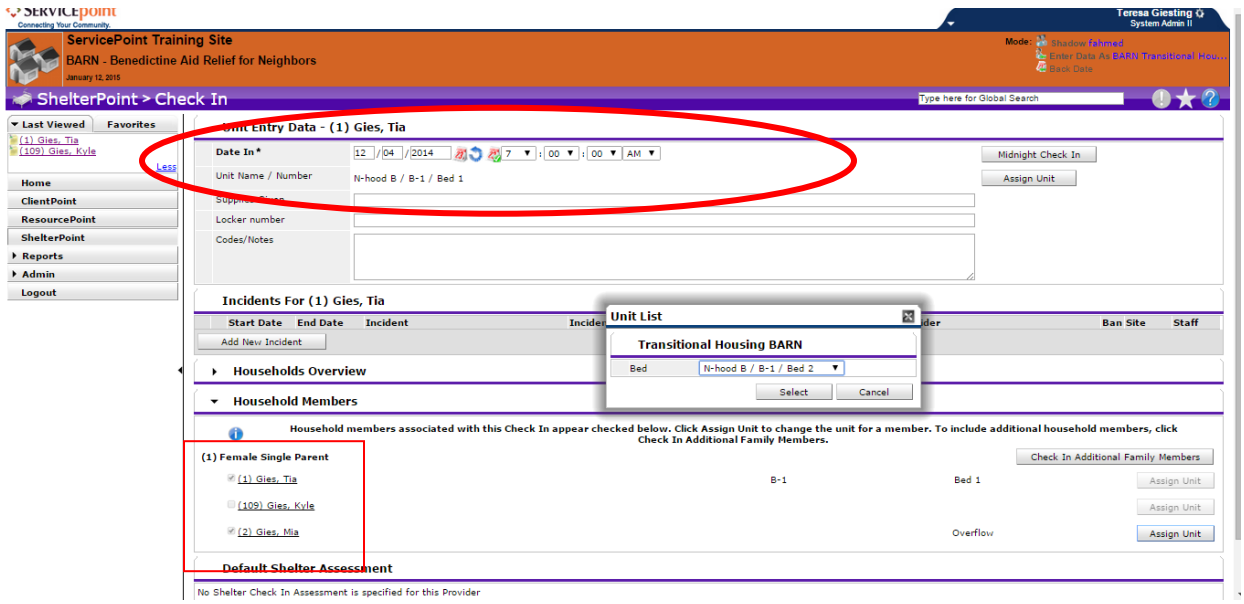
2 IMPORTANT

If the client is currently checked into a bed, the following error will display, "Error Client is currently in this bed list."

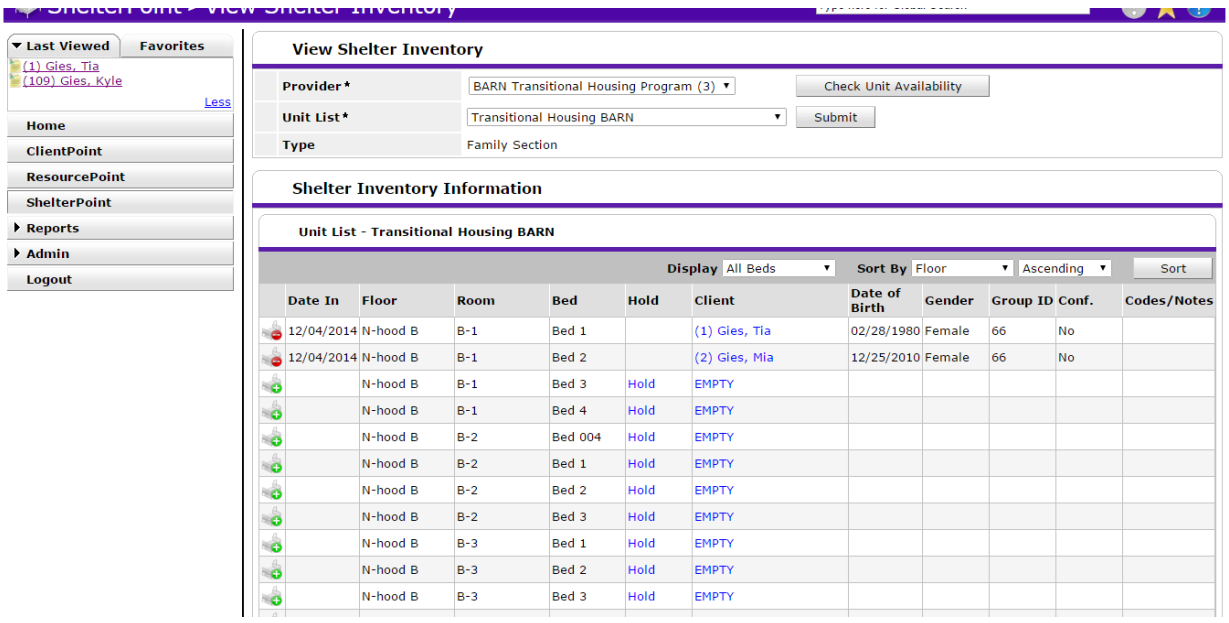
8. Enter the **Date the Client Entered your project in the "Date In" field**. **Note, the system defaults to the current date and time so you must enter the correct Bed Entry Date**

   The client will be assigned to the bed you select.

   Check in the other Household Members by checking the box left of their name
   Click Assign Unit button to assign beds, Click Select

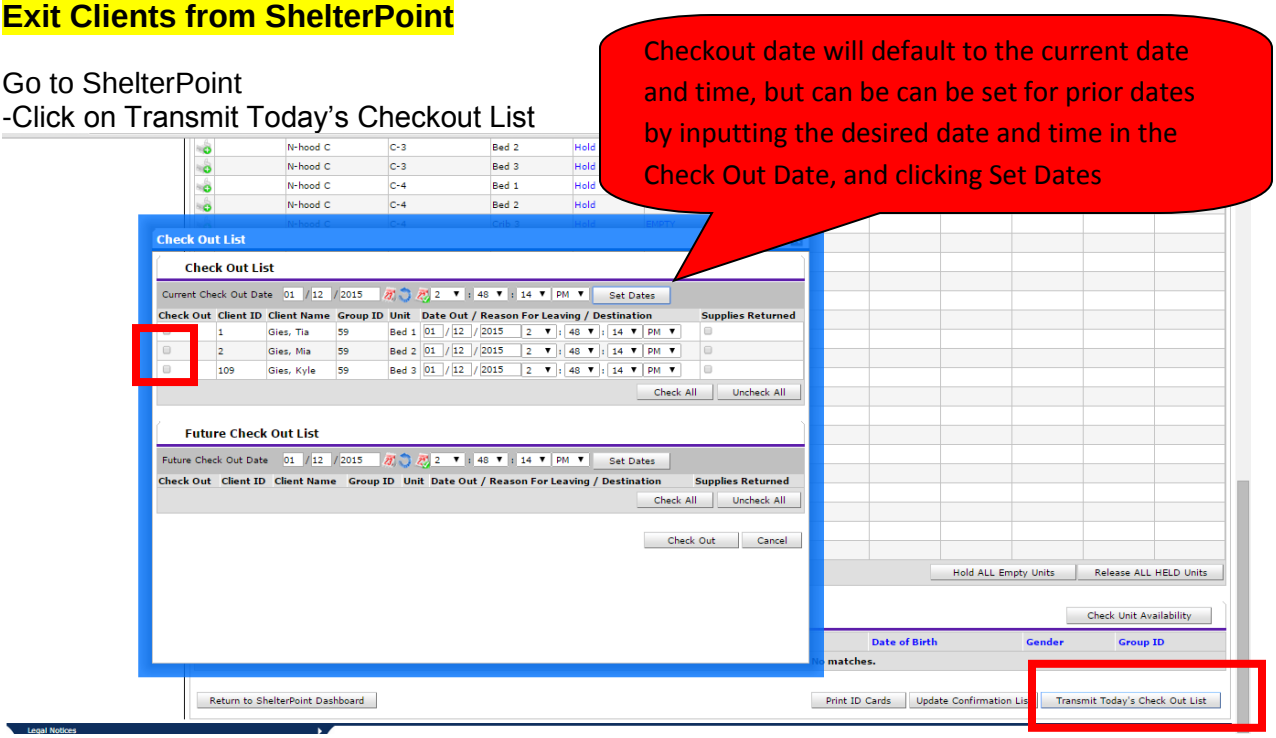

ServicePoint Training Site
BARN - Benedictine Aid Relief for Neighbors
ShelterPoint > Check In
Unit Entry Data - (1) Gies, Tia
Date In*
Unit Name / Number
N-hood B / B-1 / Bed 1
Locker number
Codes/Notes
Midnight Check In
Assign Unit
Incidents For (1) Gies, Tia
Add New Incident
Households Overview
Household Members
Household members associated with this Check In appear checked below. Click Assign Unit to change the unit for a member. To include additional household members, click Check In Additional Family Members.
(1) Female Single Parent
(1) Gies, Tia
(109) Gies, Kyle
(2) Gies, Mia
Check In Additional Family Members
Default Shelter Assessment
No Shelter Check In Assessment is specified for this Provider
Unit List
Transitional Housing BARN
Bed
N-hood B / B-1 / Bed 2
Select
Cancel

When you click Select, you will see that the clients have been entered, the Date In and the bed assignment


View Shelter Inventory
Provider*
BARN Transitional Housing Program (3)
Check Unit Availability
Unit List*
Transitional Housing BARN
Submit
Type
Family Section
Shelter Inventory Information
Unit List - Transitional Housing BARN
Display All Beds
Sort By Floor
Ascending
Sort
Date In | Floor | Room | Bed | Hold | Client | Date of Birth | Gender | Group ID | Conf. | Codes/Notes
12/04/2014 | N-hood B | B-1 | Bed 1 | | (1) Gies, Tia | 02/28/1980 | Female | 66 | No
12/04/2014 | N-hood B | B-1 | Bed 2 | | (2) Gies, Mia | 12/25/2010 | Female | 66 | No
N-hood B | B-1 | Bed 3 | Hold | EMPTY
N-hood B | B-1 | Bed 4 | Hold | EMPTY
N-hood B | B-2 | Bed 004 | Hold | EMPTY
N-hood B | B-2 | Bed 1 | Hold | EMPTY
N-hood B | B-2 | Bed 2 | Hold | EMPTY
N-hood B | B-2 | Bed 3 | Hold | EMPTY
N-hood B | B-3 | Bed 1 | Hold | EMPTY
N-hood B | B-3 | Bed 2 | Hold | EMPTY
N-hood B | B-3 | Bed 3 | Hold | EMPTY

Exit Clients from ShelterPoint

Go to ShelterPoint
-Click on Transmit Today's Checkout List


Checkout date will default to the current date and time, but can be can be set for prior dates by inputting the desired date and time in the Check Out Date, and clicking Set Dates
Check Out List
Check Out List
Current Check Out Date
Set Dates
Check Out
Client ID
Client Name
Group ID
Unit
Date Out / Reason For Leaving / Destination
Supplies Returned
Check All
Uncheck All
Future Check Out List
Future Check Out Date
Check Out
Cancel
Hold ALL Empty Units
Release ALL HELD Units
Check Unit Availability
Date of Birth
Gender
Group ID
Return to ShelterPoint Dashboard
Print ID Cards
Transmit Today's Check Out List

-Select the clients to exit
-Select the checkout date based on the morning following the last night they spent in the program/shelter. (Example: If client spent the night of June 30, the exit is July 1. As a standard practice, set the time of exit from the Shelter bed at 7 a.m. **The computer defaults to the current date and time when you open the Transmit Today's Checkout List, so remember to select the correct date they left, or your bed night report will be wrong!**)

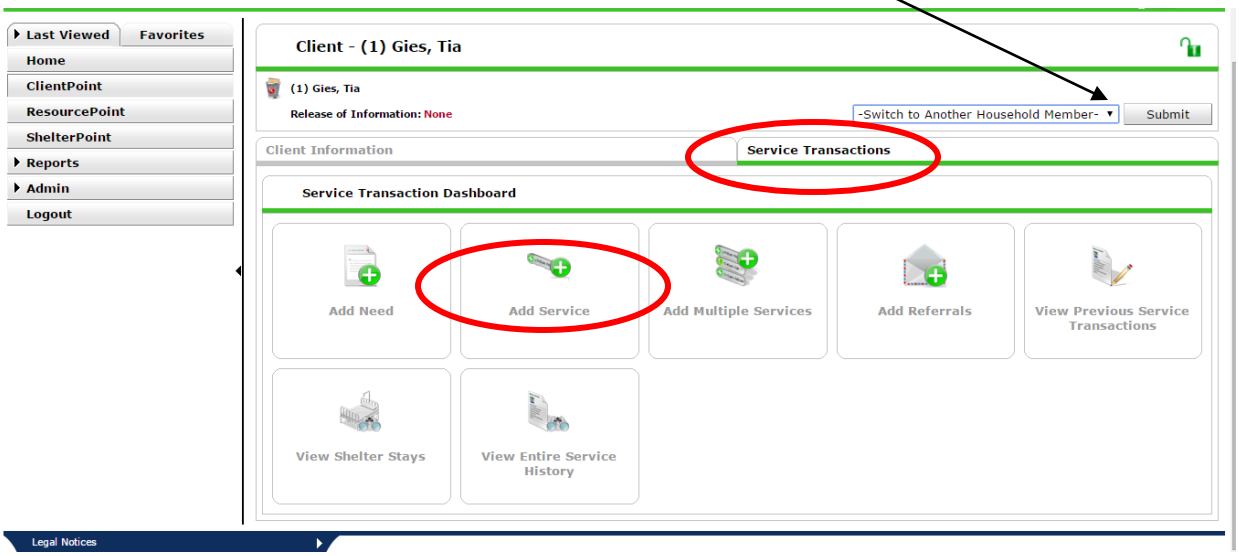
Service Transactions and Funding Workflow

Required for ESG (Emergency Solutions Grant), RRH (Rapid Re Housing projects) and Prevention projects

After completing the standard data entry workflow you will need to enter Service Transactions for the Case Management and Financial services provided to Clients in these program types.

The most important thing to remember when you start entering the Services is to be certain you switch to the Head of Household entry.

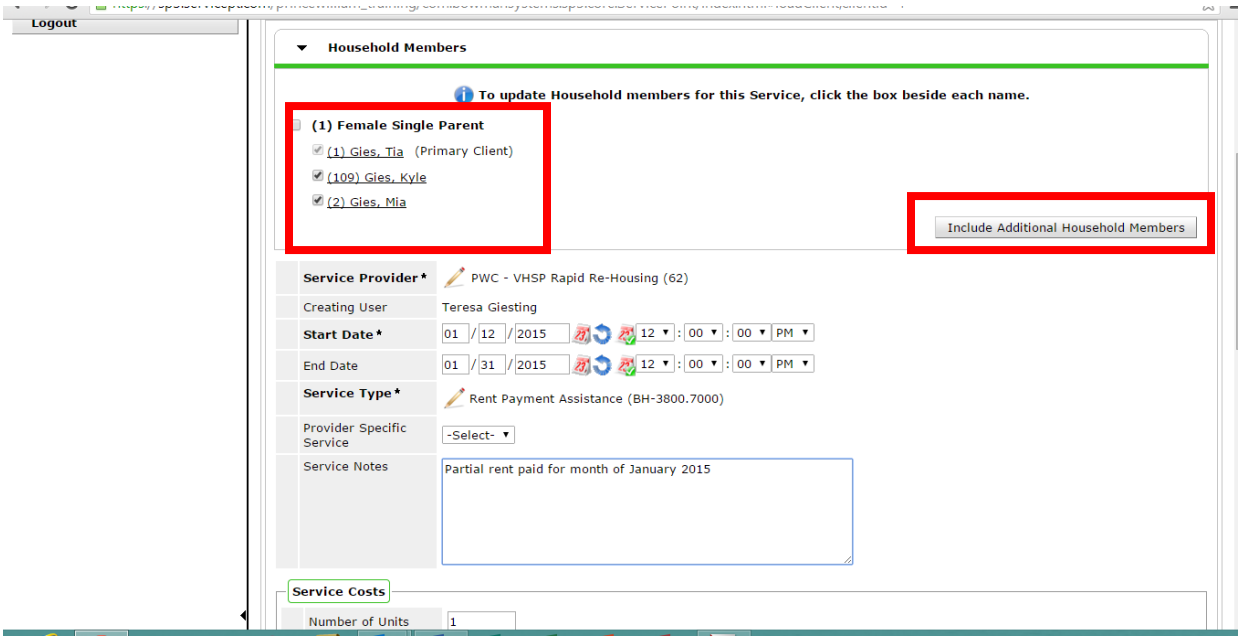
You can easily switch to the head of household by clicking the down arrow in the Switch to Another Household Member, select the head, click Submit.



Click on the Service Transaction Tab in the head of hh record

- Select Add Service Click (Note, when you click Add Service, a related Need is automatically established)

- Click the boxes to Include the other hh members in the transaction. If you don't see all the household members, you will see a box that says Include Additional Household Members. Click it to bring in the names of other hh members and put check marks next to the other hh members names.



For Rent Payment Assistance or services with financial assistance, Add a Service for <u>each</u> month financial assistance is provided. Each Service will automatically have a related Need created. There must be a 1 to 1 relationship between Need and Service for some reports to return accurate information. **(Do not add additional Rent Payment Assistance Services under a single Need, or reports may return inflated financial assistance).**

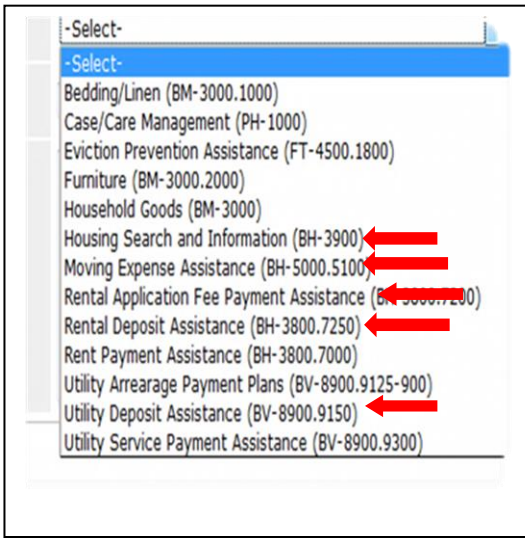
1) Household Members: Select all Household Members to be included in the Service Transaction.
2) Service Provider: The Provider should already be set to your EDA Provider.
3) Start Date: The Start Date will be pre-populated with the effective date selected when entering the Client's record

> *If Transactions are being created AFTER the Client's Entry Date, the "Use Current System Date" option can be selected in the Back Date Mode Window.*

4) End Date:
   a) For one-and-done transactions (marked with a red arrow in the image on the right)

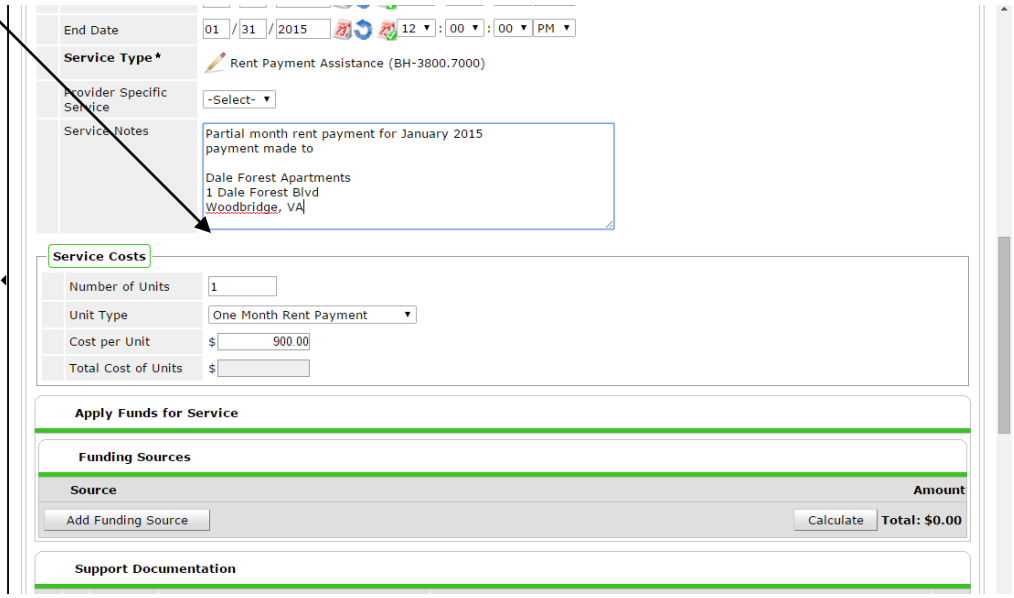
Choose the calendar icon with the check mark to set the End Date the same as the Start Date.

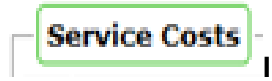
   b) For monthly transactions, choose the last date of the month for which the payment is being applied.



> *See the PWC ESG, RRH, and Prevention Quicklist with Definitions for allowed Service Transactions*

5) **Service Notes:** In the notes section, type in the name and address of the Payee (Entity to which the payment is being made) and for ongoing rental and utility assistance, enter the address of the property for which the assistance is being paid.



6) 

In the Service Costs section

Enter Number of Units: Each unit should be entered in a separate transaction, therefore, the Number of Units should be 1 for all transactions except Case Management. For Case Management, enter the number of 15 minute units.

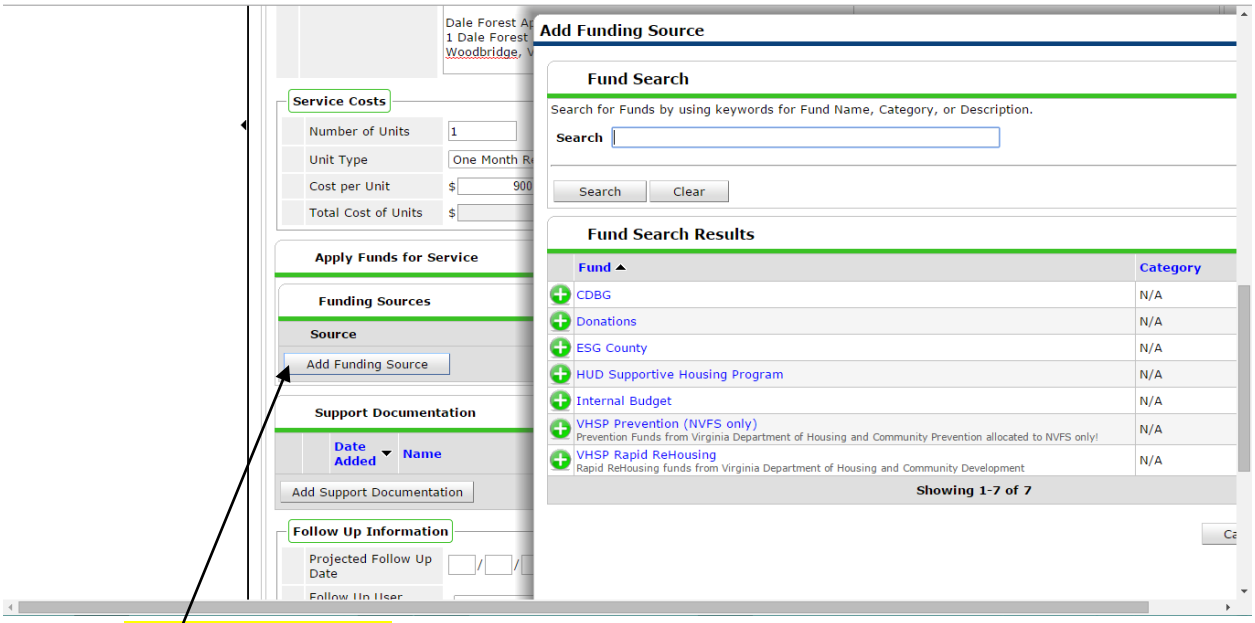
Unit Type: Select the Unit Type from the dropdown box.

Total Cost of Units: This field is greyed out and not editable.

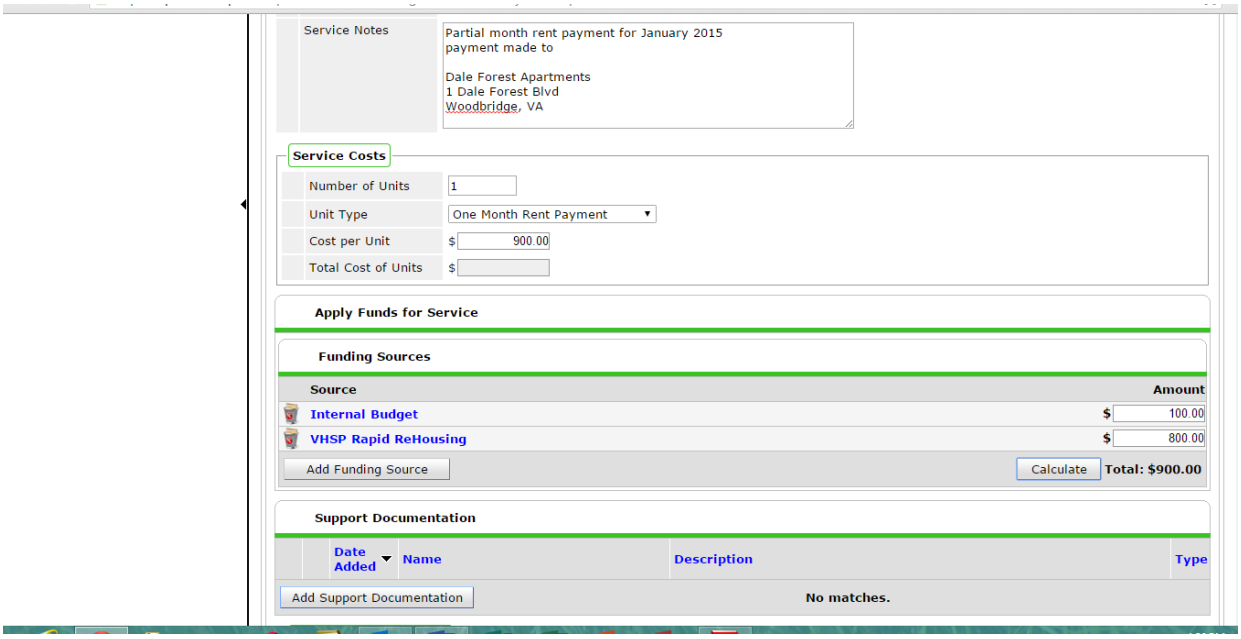
Cost per Unit: Input the total cost of the service. (Note if 2 Funding Sources were used, Funding Source 1=$800, and Funding Source 2 = $100, the Cost per Unit = $900)

To ensure full information is available for reports regarding cost and funding sources, you must complete BOTH the Service Costs and Apply Funds for Service Sources sections as described in steps 6) above and 7) below

7) **Apply Funds for Service**

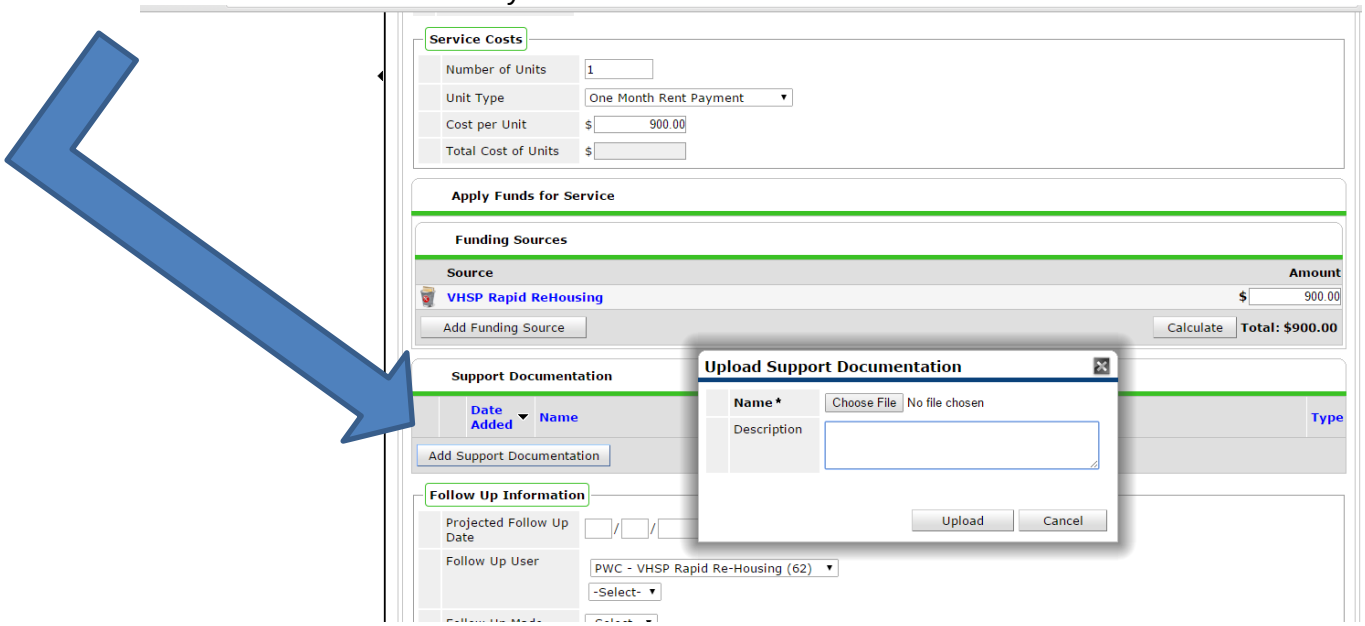


Click the Add Funding Source button when the next window opens, select the appropriate Funding Source from the drop-down list and enter the Amount of Funding. Click Calculate for Total.

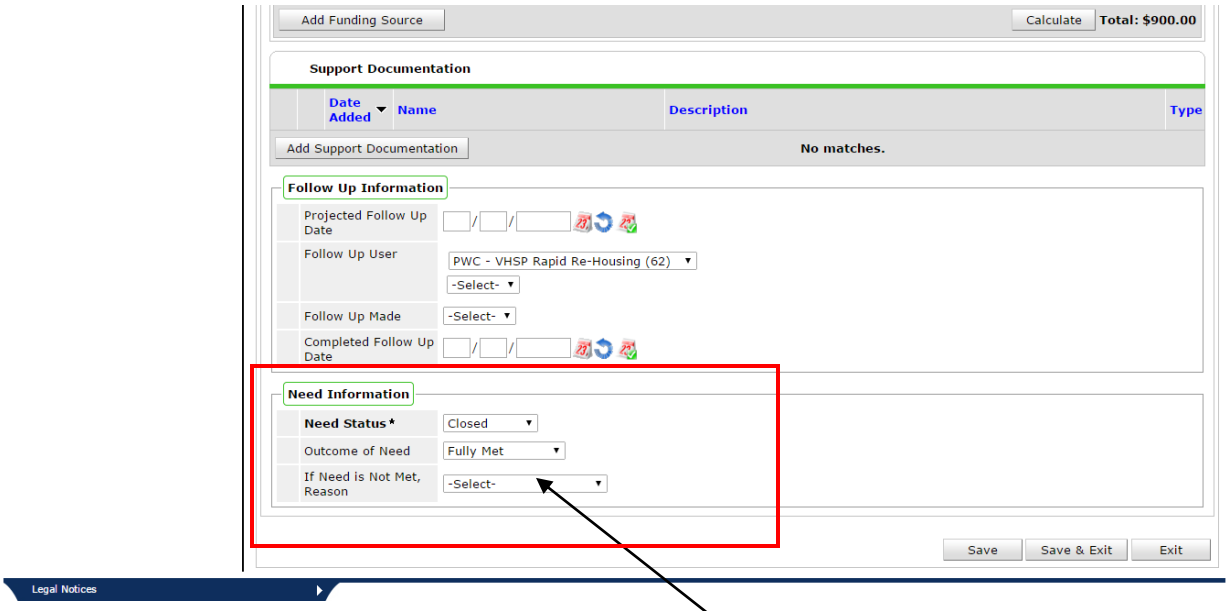


8)

Add Support Documentation allows you to browse files to attach copies of supporting documentation such as Utility Bills



9) **Follow-Up Information:** If the Client is receiving services that will require recertification, enter a follow-up date as a reminder for the appointment.



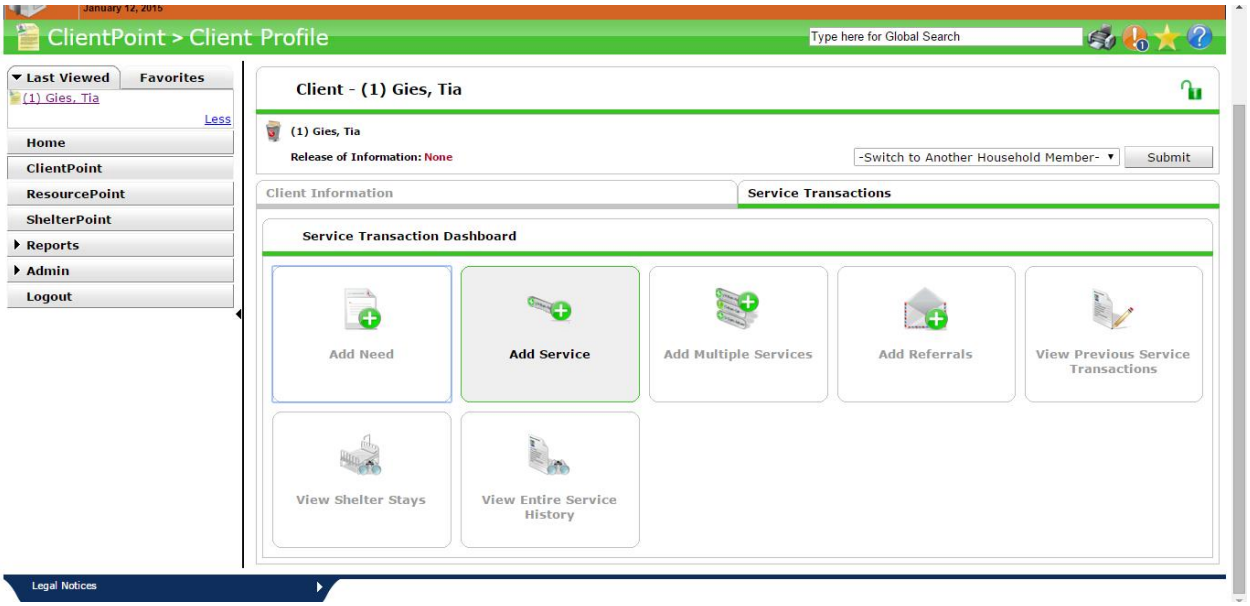
10) Need Information:

a) If there will not be any more payments made of this type, choose **a Need Status of Closed and set the Outcome to Fully Met.**

b) For recurring Service Transactions such as Case Management, select a Status of In Progress. Make sure to close out the Case Management Service when you are exiting a client from the program by Choosing Status of Closed, Outcome Fully Met.

When returning to add Services to an already established Need such as Case Management; Click on the Add Service Icon next to the appropriate Need.

- Repeat steps 1 – 10 listed above.



Additional Tips for Service Transactions

For Services like Rent Payments, The Start Date would be the 1st day of the month (if first month was a partial then the start day would be the date of move in or date program started paying rent), the Service End Date would be the end of the month the rent is paid for.

If it is a one-time fee like a Security Deposit, rental app fee the Service Start Date and End Date will be the same date.

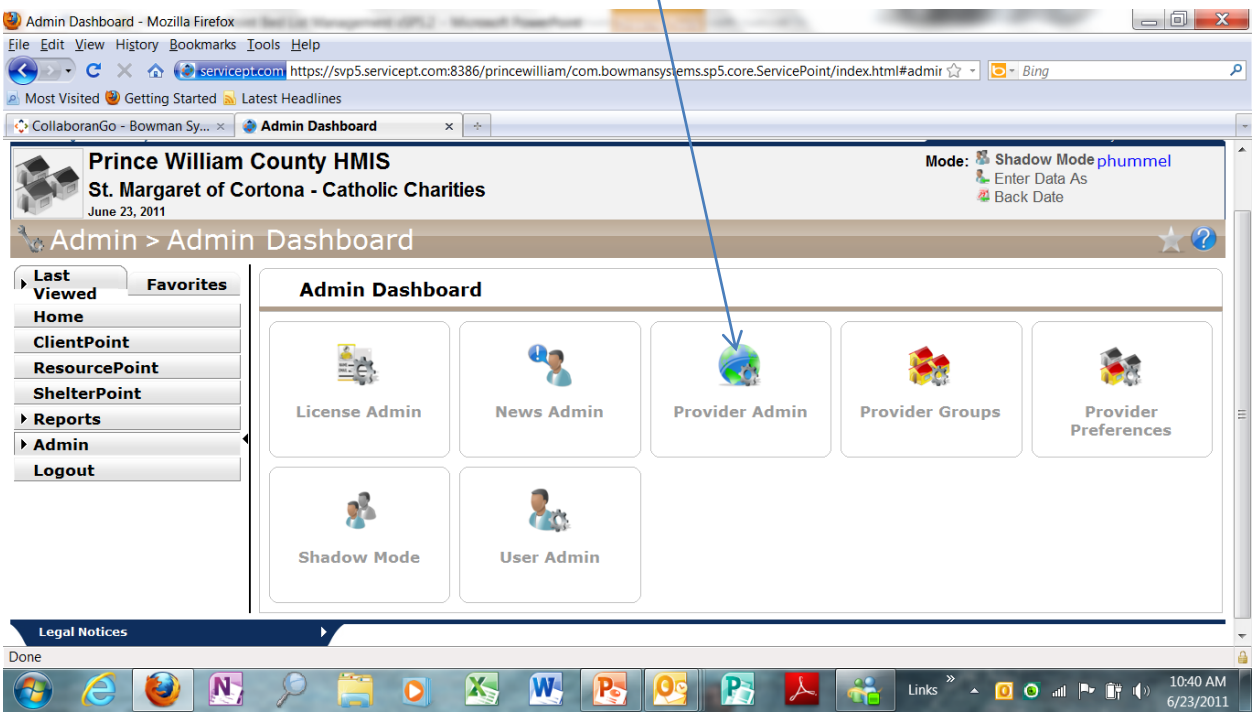
When you start working with a RRH or Prevention client, the first service is likely to be Case Management and should be done no later than 2 pm the following business day (this would be in compliance with our new Timeliness of Data Entry Standard that went into effect 12-1-13). The Service Start Date and End Date would be the same date, and the time spent would be the actual CM time. Units of service are calculated in 15 min intervals (1 hour = 4 units @ 15 min intervals.)

At one of the RRH Committee meetings, it was decided that a separate Case Management Service should be recorded for each time you provide case management services. The start and end date for the service would be the same day and the start/end time would be relative to the time you provided the service.

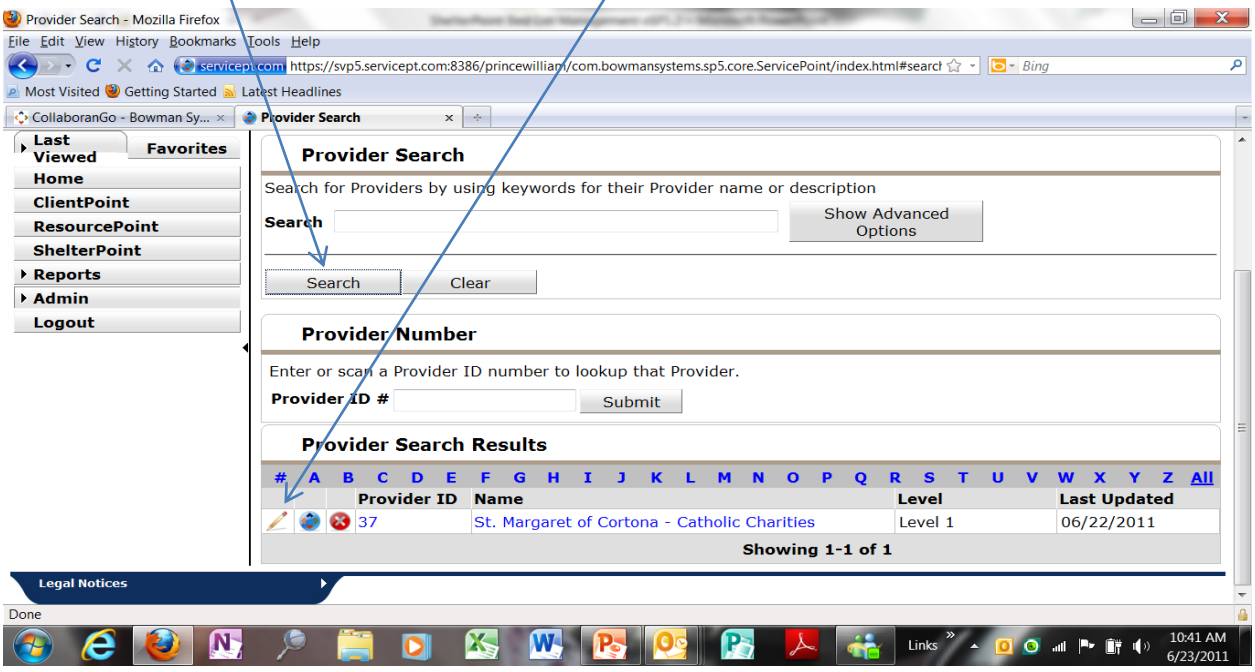
If you need to correct your clients Rent Payment Start and End Date, you do not need to be in backdate mode. Just go to the service transaction related to that payment and change the end date to last day of the month and save. Be sure to include all the hh members in the service & MAKE SURE you are doing all the services from the Head of HH record and head of hh Service Transaction Tab, not a child's record.

Managing Bedlists

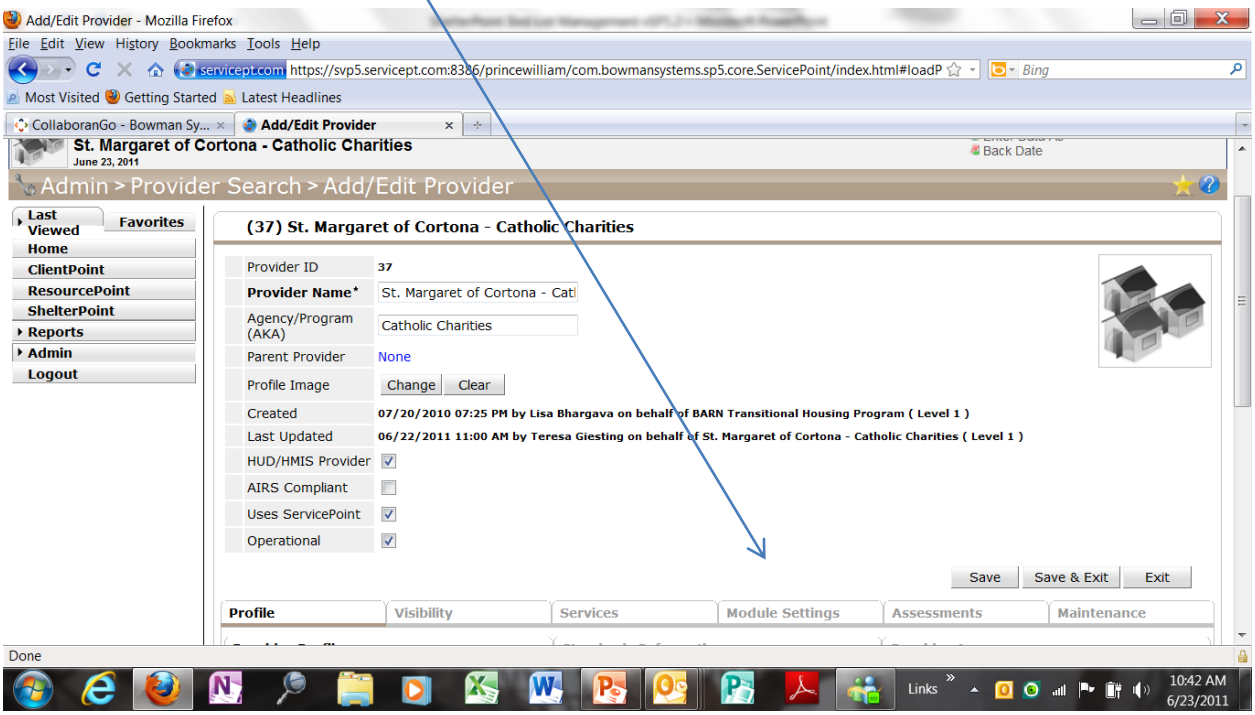
1. From the Admin Drop Down box click Provider Admin



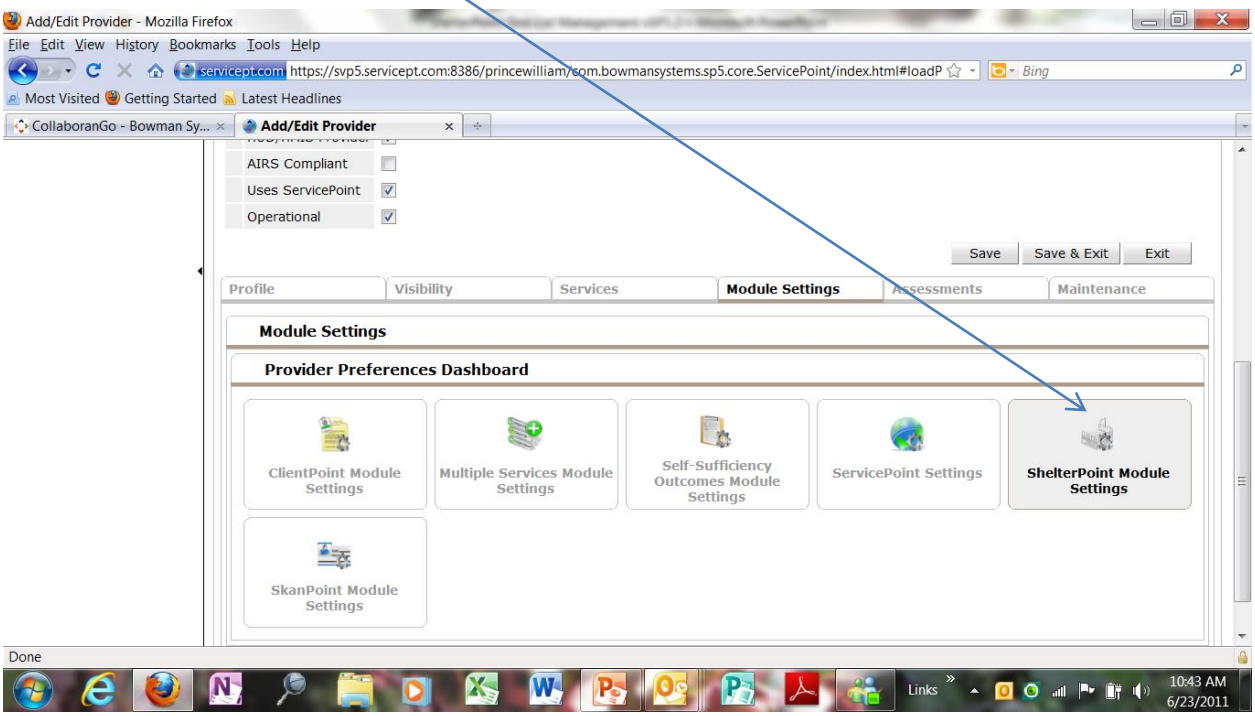
2. Click the Search button, then click the Pencil next to your Provider



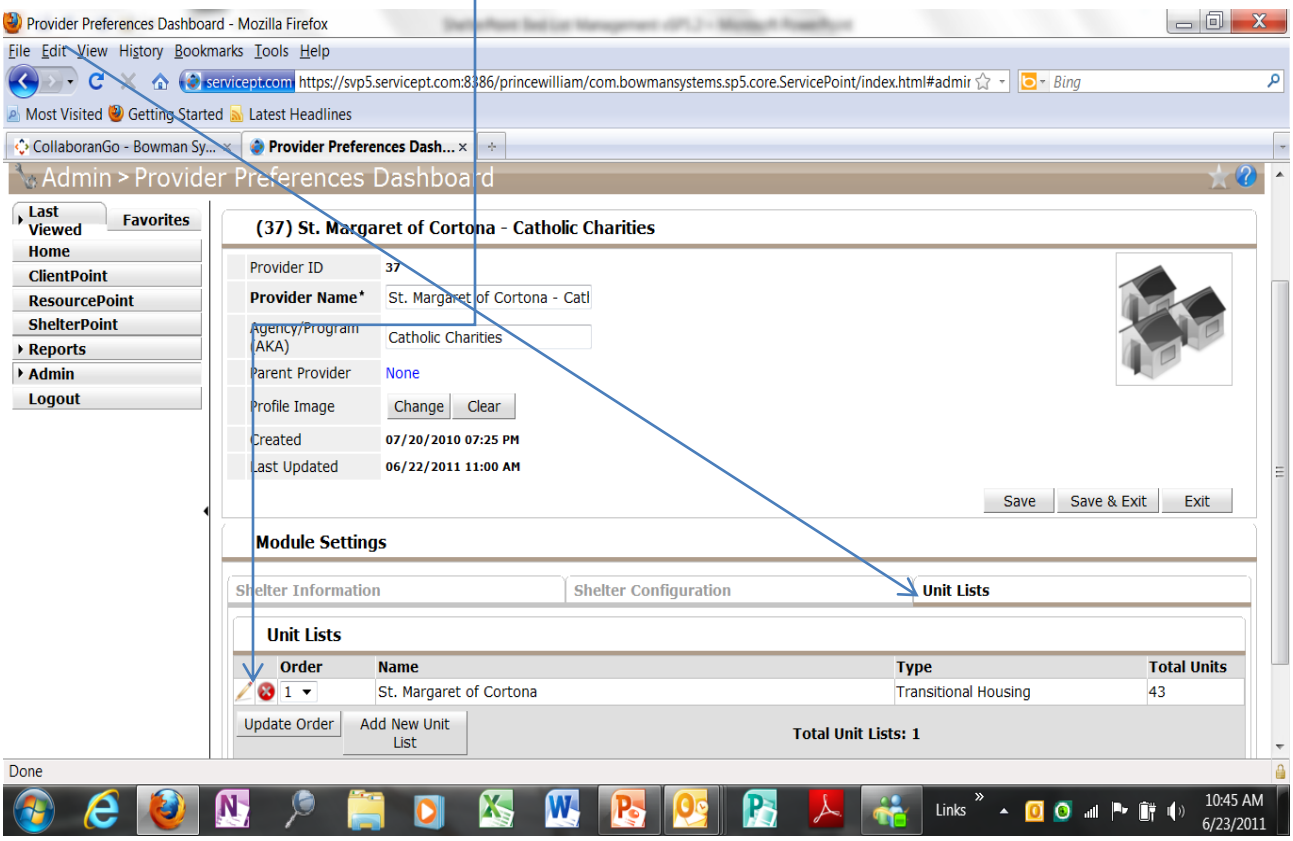
3. Click the Module Settings Tab



4. Click ShelterPoint Module Settings

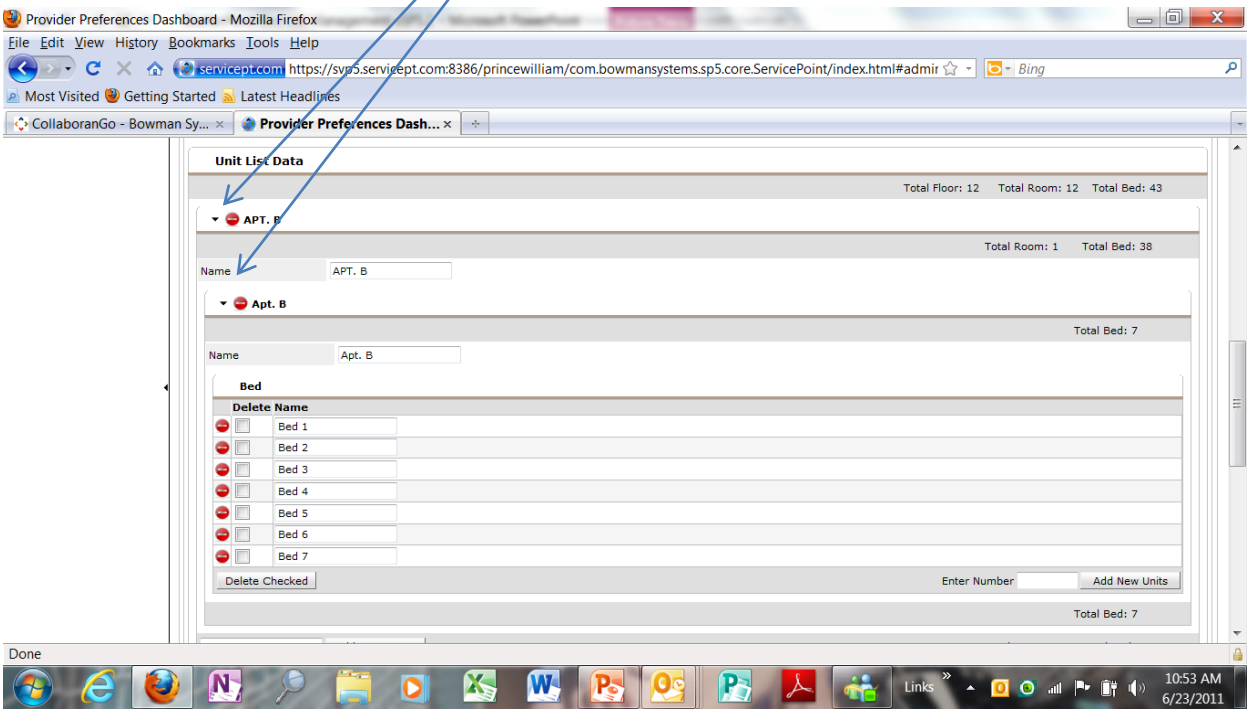


5. Click the Unit List Tab, then the Pencil

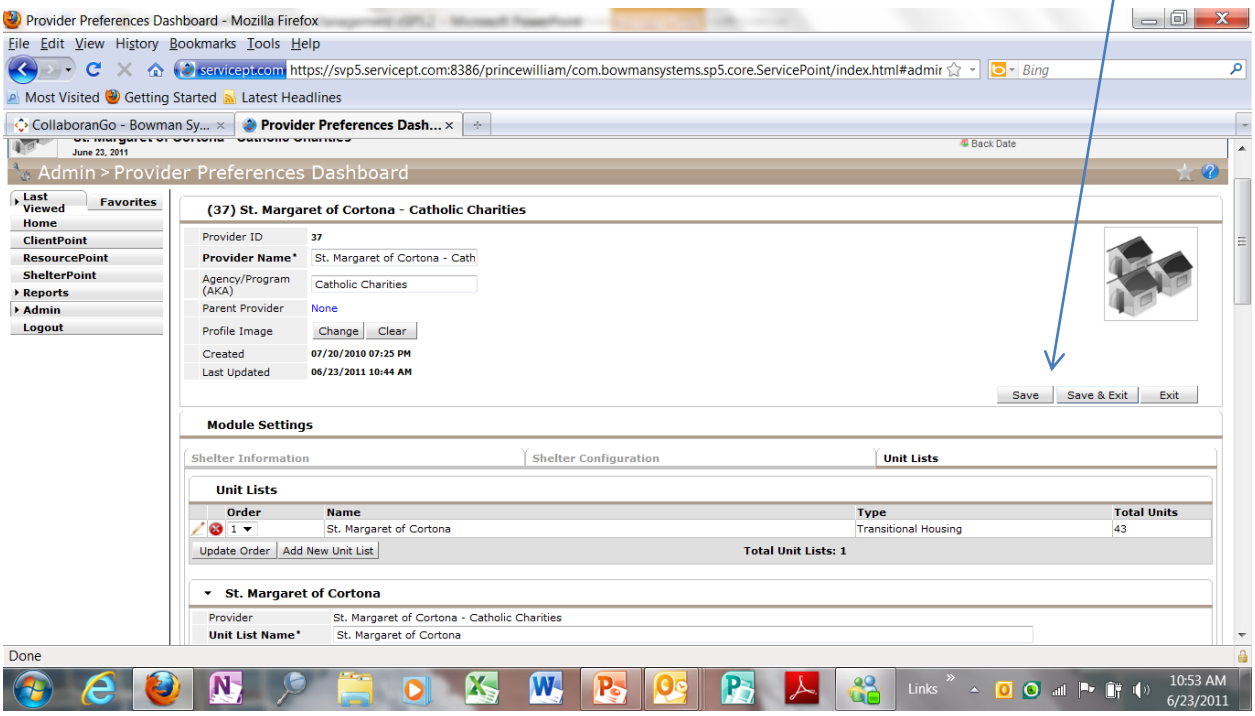

Provider Preferences Dashboard - Mozilla Firefox
Admin > Provider Preferences Dashboard
(37) St. Margaret of Cortona - Catholic Charities
Provider ID 37
Provider Name* St. Margaret of Cortona - Catl
Agency/Program (AKA) Catholic Charities
Parent Provider None
Profile Image Change Clear
Created 07/20/2010 07:25 PM
Last Updated 06/22/2011 11:00 AM
Save Save & Exit Exit
Module Settings
Shelter Information
Shelter Configuration
Unit Lists
Unit Lists
Order Name Type Total Units
1 St. Margaret of Cortona Transitional Housing 43
Update Order
Add New Unit List
Total Unit Lists: 1
Done

6. Open the Unit and bed list by clicking the Down Arrow in each level until the Bed List is displayed

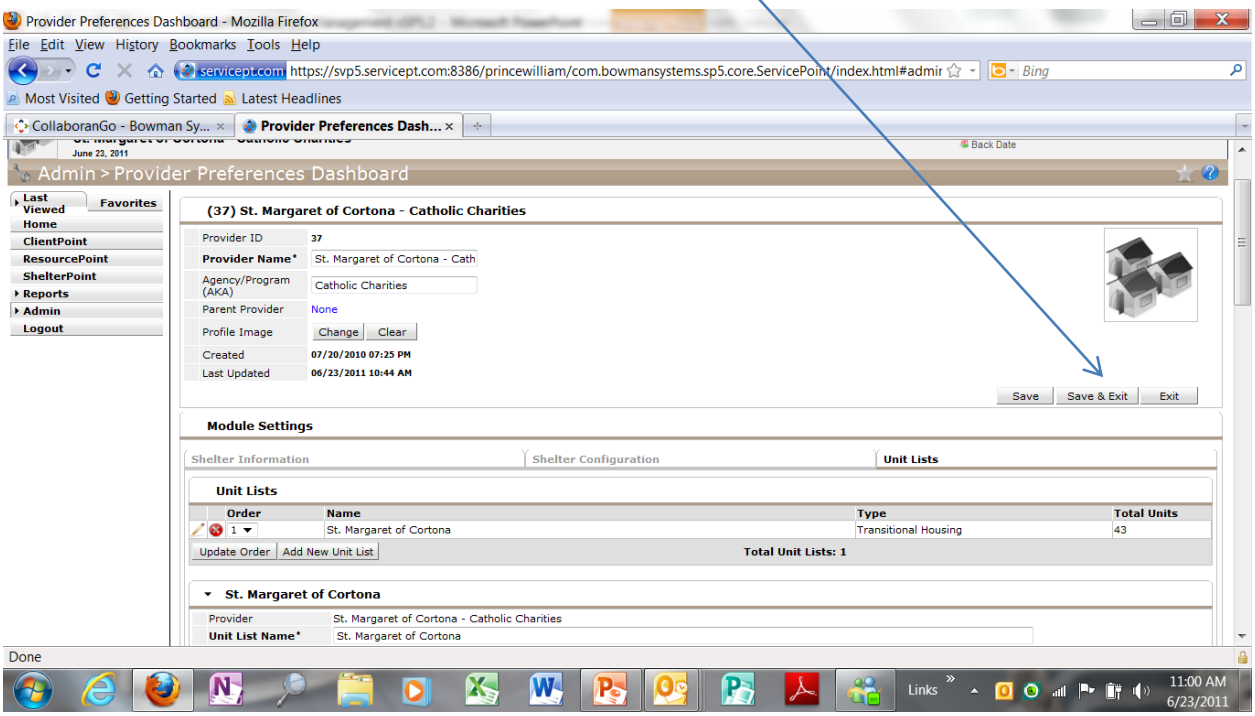
From here you can add or delete beds



7. When you have added or deleted beds you Must scroll to the top of the screen and Save your work before moving to another Apartment or unit to make any other changes



8. When you have finished managing your bed lists, Save & Exit the ShelterPoint Module!!

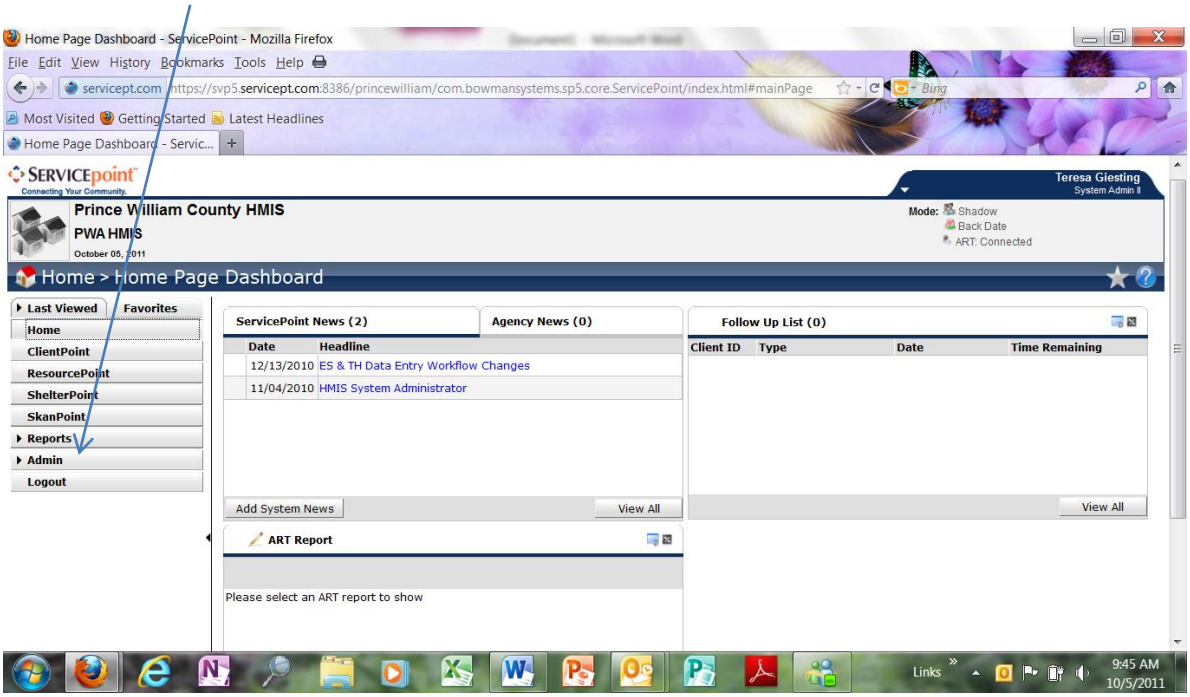


Reset a User's Password

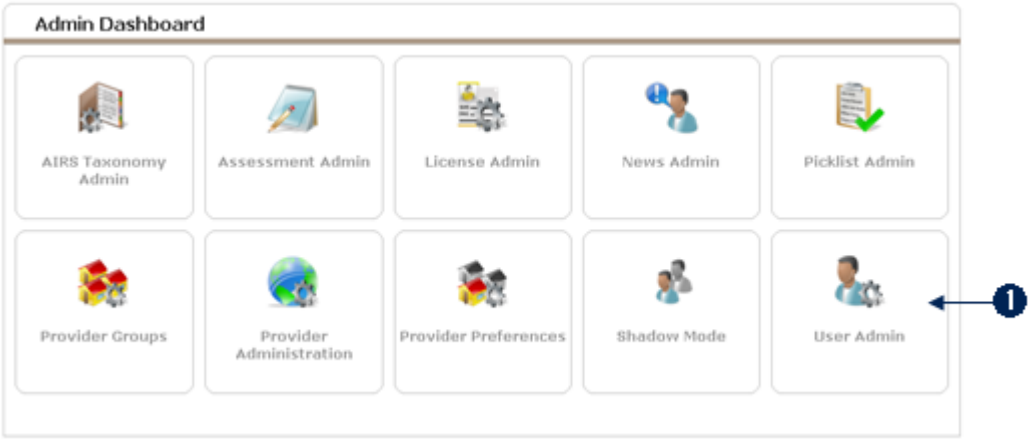
Those who have Agency Admin rights attached to their ServicePoint license can reset passwords for other users in your Provider group.

Follow the steps below to reset a user's password.

1. Click the *Admin* tab on the navigation toolbar.

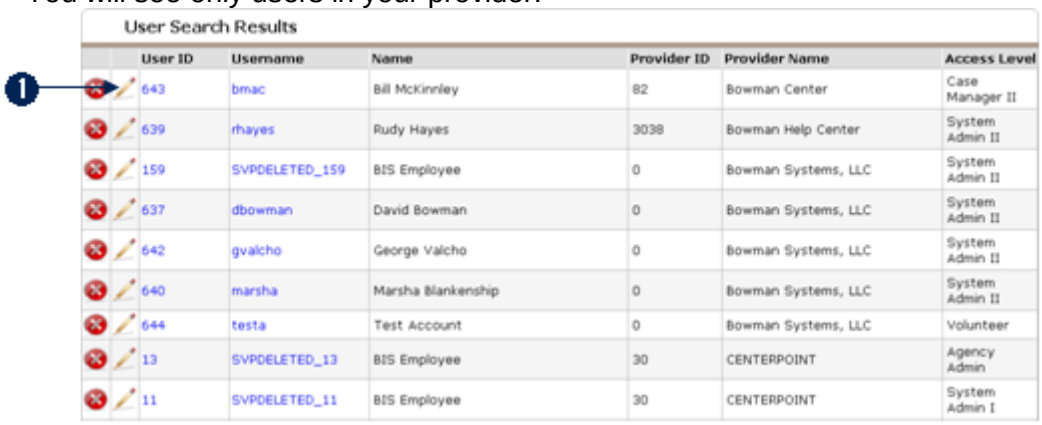


2. The screen will refresh and display the **Admin Dashboard**.



3. Click **User Admin.** (1) The **User Search** screen will display

4. Enter key words in the **Search** (1) field to locate the user and click **Search.** (2)
   You will see only users in your provider.


User Search Results
1
User ID
Username
Name
Provider ID
Provider Name
Access Level
643 bmac Bill McKinnley 82 Bowman Center Case Manager II
639 rhayes Rudy Hayes 3038 Bowman Help Center System Admin II
159 SVPDELETED_159 BIS Employee 0 Bowman Systems, LLC System Admin II
637 dbowman David Bowman 0 Bowman Systems, LLC System Admin II
642 gvalcho George Valcho 0 Bowman Systems, LLC System Admin II
640 marsha Marsha Blankenship 0 Bowman Systems, LLC System Admin II
644 testa Test Account 0 Bowman Systems, LLC Volunteer
13 SVPDELETED_13 BIS Employee 30 CENTERPOINT Agency Admin
11 SVPDELETED_11 BIS Employee 30 CENTERPOINT System Admin I

5. **User Search Results** will display. Click the **Edit** icon next to the user that requires a password reset. (1)
6. Click **Generate Password** to create a new password for the user. (1) Click **Reset** to return the **Consecutive Bad Login** count to zero. (2)\
7. Click **Save** to retain the changes, (3), click **Save & Exit** to retain the changes and return to the previous screen. (4) Click **Exit** to return to the previous screen without retaining the changes. (5)

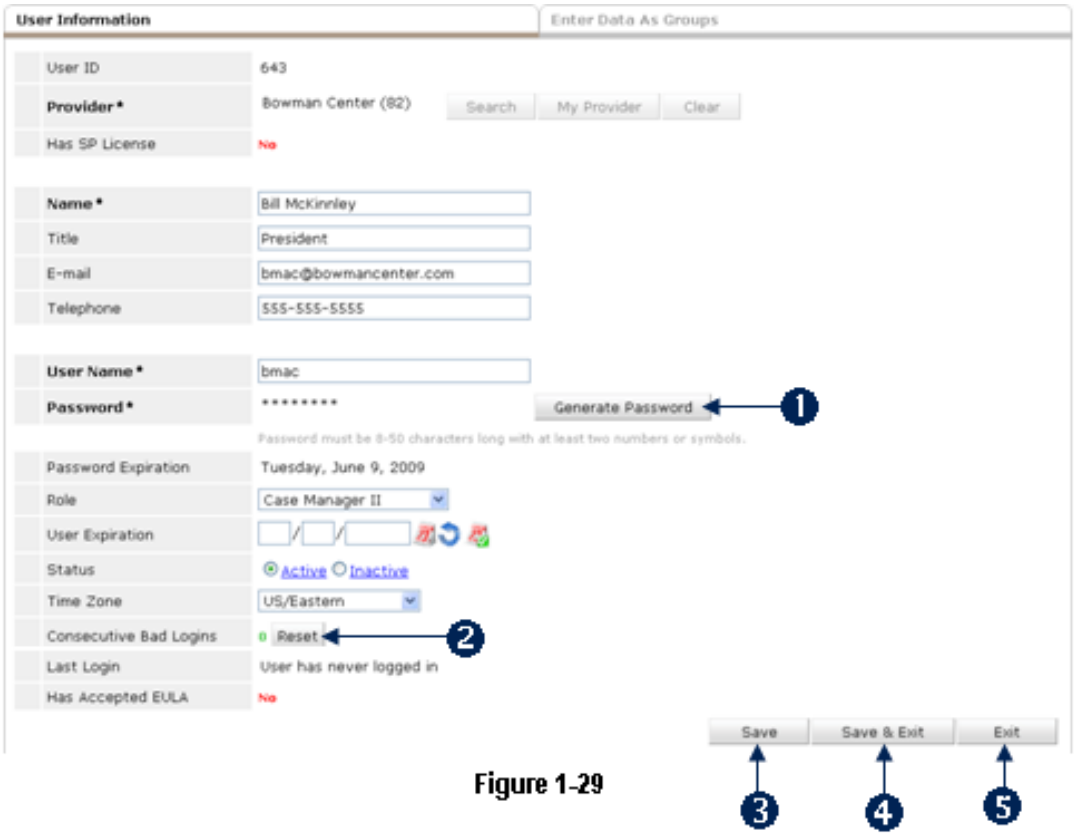
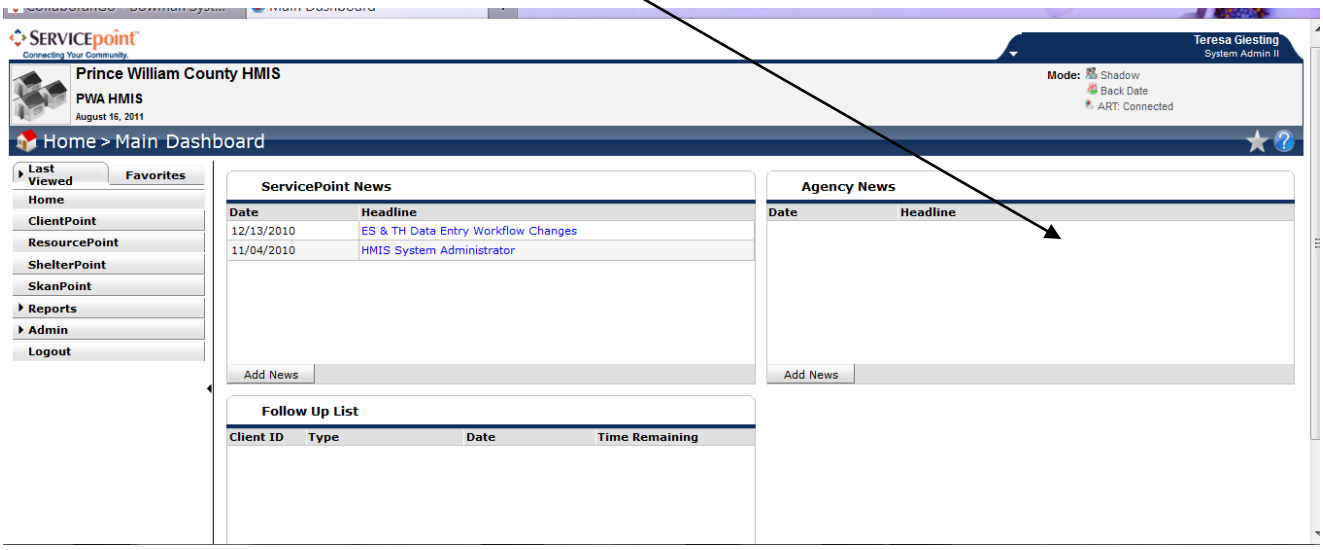

User Information
Enter Data As Groups
User ID 643
Provider * Bowman Center (82) Search My Provider Clear
Has SP License No
Name * Bill McKinnley
Title President
E-mail bmac@bowmancenter.com
Telephone 555-555-5555
User Name * bmac
Password * ******** Generate Password
1
Password must be 8-50 characters long with at least two numbers or symbols.
Password Expiration Tuesday, June 9, 2009
Role Case Manager II
User Expiration
Status Active Inactive
Time Zone US/Eastern
Consecutive Bad Logins 0 Reset
2
Last Login User has never logged in
Has Accepted EULA No
Save Save & Exit Exit
3 4 5

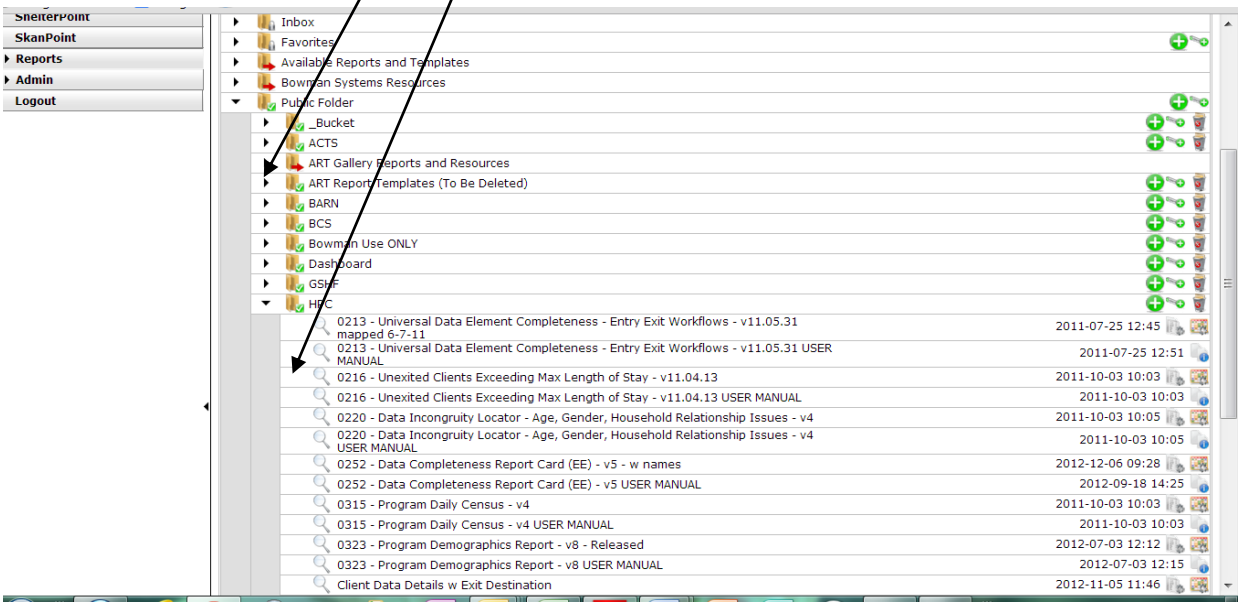
Figure 1-29

Running ART Reports

To get into ART, Click on the word “Connected” at the top right of your screen. This opens ART.



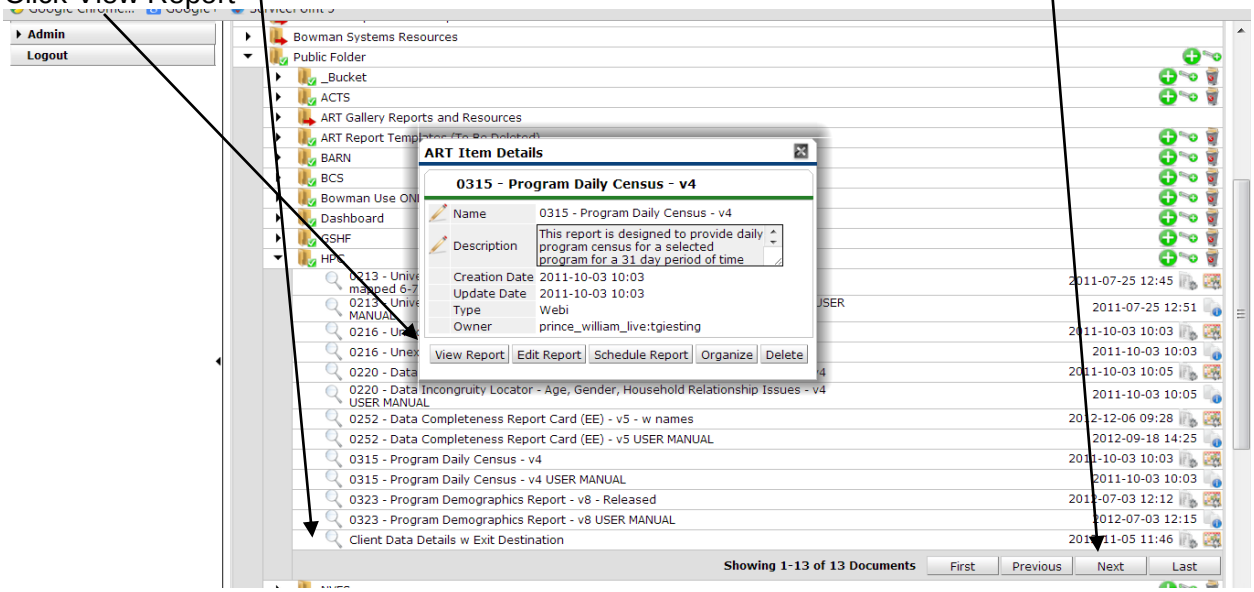
-Click on the triangle next to Public Folders to open that folder
-Click on the triangle next to Your Program to open the reports in your folder


ShelterPoint
SkanPoint
Reports
Admin
Logout
Inbox
Favorites
Available Reports and Templates
Bowman Systems Resources
Public Folder
_Bucket
ACTS
ART Gallery Reports and Resources
ART Report Templates (To Be Deleted)
BARN
BCS
Bowman Use ONLY
Dashboard
GSHF
HDC
0213 - Universal Data Element Completeness - Entry Exit Workflows - v11.05.31 mapped 6-7-11 2011-07-25 12:45
0213 - Universal Data Element Completeness - Entry Exit Workflows - v11.05.31 USER MANUAL 2011-07-25 12:51
0216 - Unexited Clients Exceeding Max Length of Stay - v11.04.13 2011-10-03 10:03
0216 - Unexited Clients Exceeding Max Length of Stay - v11.04.13 USER MANUAL 2011-10-03 10:03
0220 - Data Incongruity Locator - Age, Gender, Household Relationship Issues - v4 2011-10-03 10:05
0220 - Data Incongruity Locator - Age, Gender, Household Relationship Issues - v4 USER MANUAL 2011-10-03 10:05
0252 - Data Completeness Report Card (EE) - v5 - w names 2012-12-06 09:28
0252 - Data Completeness Report Card (EE) - v5 USER MANUAL 2012-09-18 14:25
0315 - Program Daily Census - v4 2011-10-03 10:03
0315 - Program Daily Census - v4 USER MANUAL 2011-10-03 10:03
0323 - Program Demographics Report - v8 - Released 2012-07-03 12:12
0323 - Program Demographics Report - v8 USER MANUAL 2012-07-03 12:15
Client Data Details w Exit Destination 2012-11-05 11:46

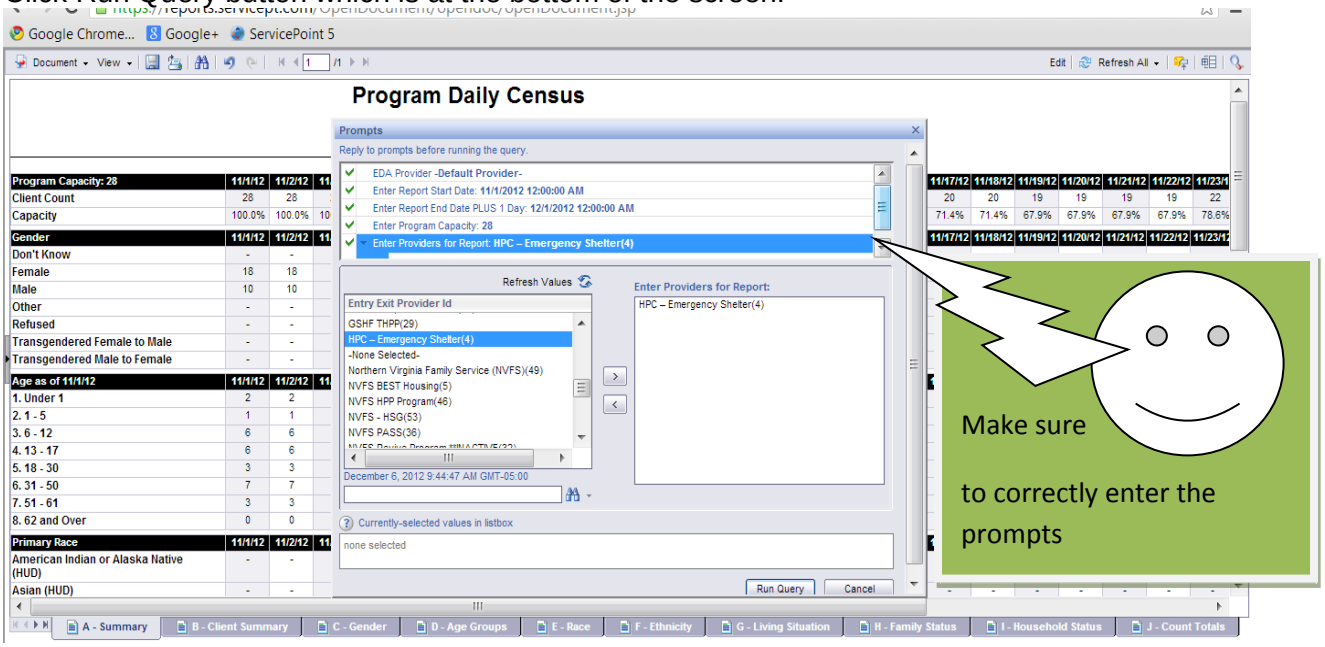
-Click on the Magnifying glass next to the report you want to run. Note, you may have more than 1 page of Reports/User Manuals. To locate reports on other pages, click Next.

Each report has a User Manual that you can download if you have questions about what to put into the prompts. The information about the prompts is usually on page 2 or 3 of the Manual.

-Click View Report


Admin
Logout
Bowman Systems Resources
Public Folder
_Bucket
ACTS
ART Gallery Reports and Resources
BARN
BCS
Dashboard
GSHF
ART Item Details
0315 - Program Daily Census - v4
Name
0315 - Program Daily Census - v4
Description
This report is designed to provide daily program census for a selected program for a 31 day period of time
Creation Date 2011-10-03 10:03
Update Date 2011-10-03 10:03
Type Webi
Owner prince_william_live:tgiesting
View Report
Edit Report
Schedule Report
Organize
Delete
0220 - Data Incongruity Locator - Age, Gender, Household Relationship Issues - v4 USER MANUAL
0252 - Data Completeness Report Card (EE) - v5 - w names
0252 - Data Completeness Report Card (EE) - v5 USER MANUAL
0315 - Program Daily Census - v4
0315 - Program Daily Census - v4 USER MANUAL
0323 - Program Demographics Report - v8 - Released
0323 - Program Demographics Report - v8 USER MANUAL
Client Data Details w Exit Destination
Showing 1-13 of 13 Documents
First
Previous
Next
Last

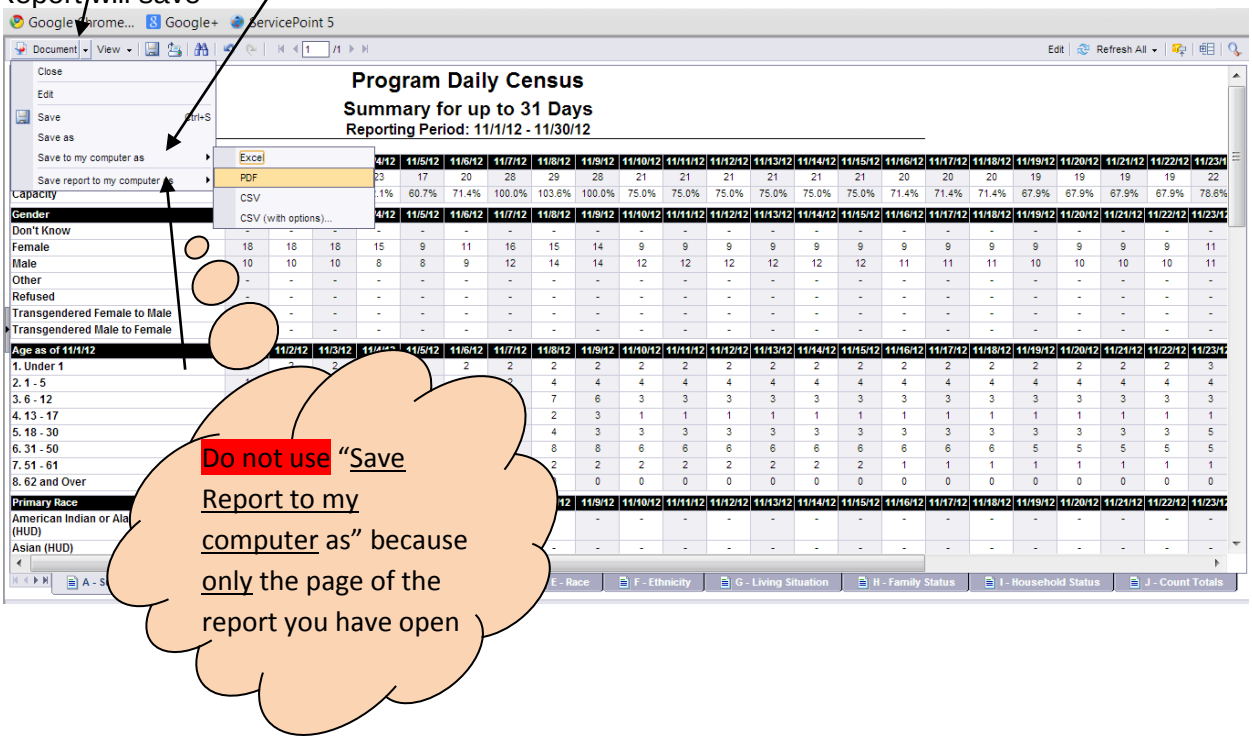
-Put in the necessary information for the prompts.
-Allow the first prompt to remain at the default setting: “EDA Provider – Default Provider (which is the Level 1 provider for your agency)
-In the left Entry Exit Provider ID, select the providers for the report by Double clicking the program in the left box to select. Double clicking will display them as selections in the right box
-If no values show, click the Refresh Values button to get the selections
-Remove unwanted selections by selecting and then hitting < button
-Click Run Query button which is at the bottom of the screen.



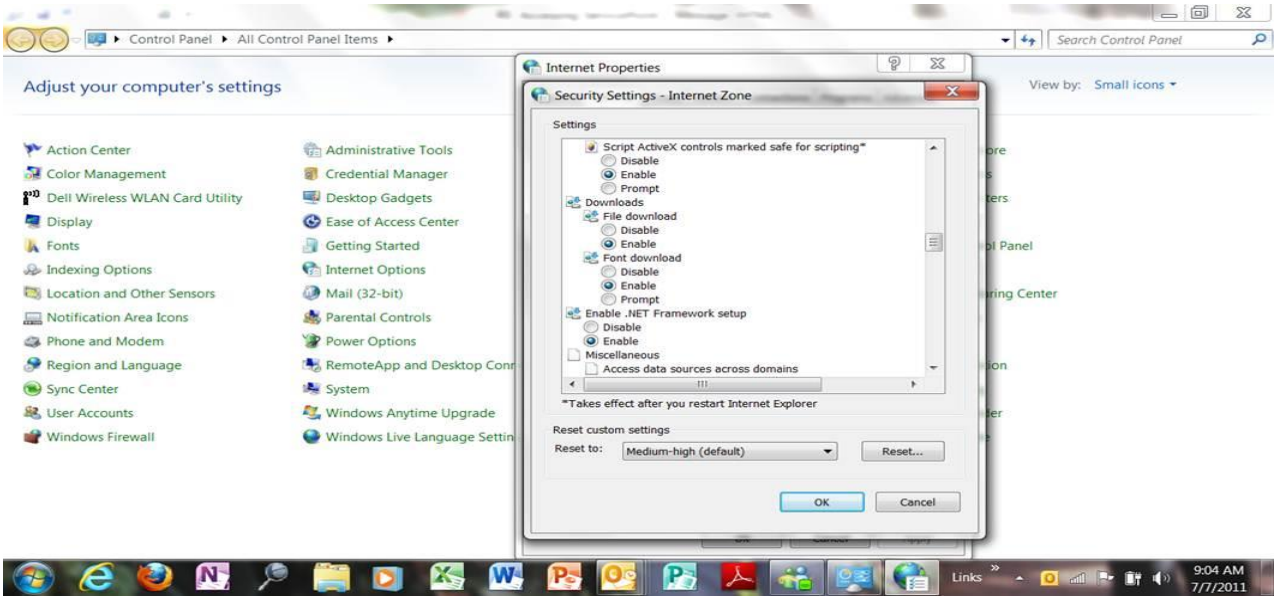
After the report runs, make sure you have data in it before saving it to pdf! If you didn’t put in all information for the prompts, the data won’t be brought into the report. If you need to re run, just Click the “Refresh All” button

To Save

-Click on Document down arrow top left of ART screen to open the drop box
-Click "Save to my Computer as"
-Click pdf, or you can save as Excel if you prefer
-Or you can click on the printer icon which will convert to and Adobe file which you can save Report will save



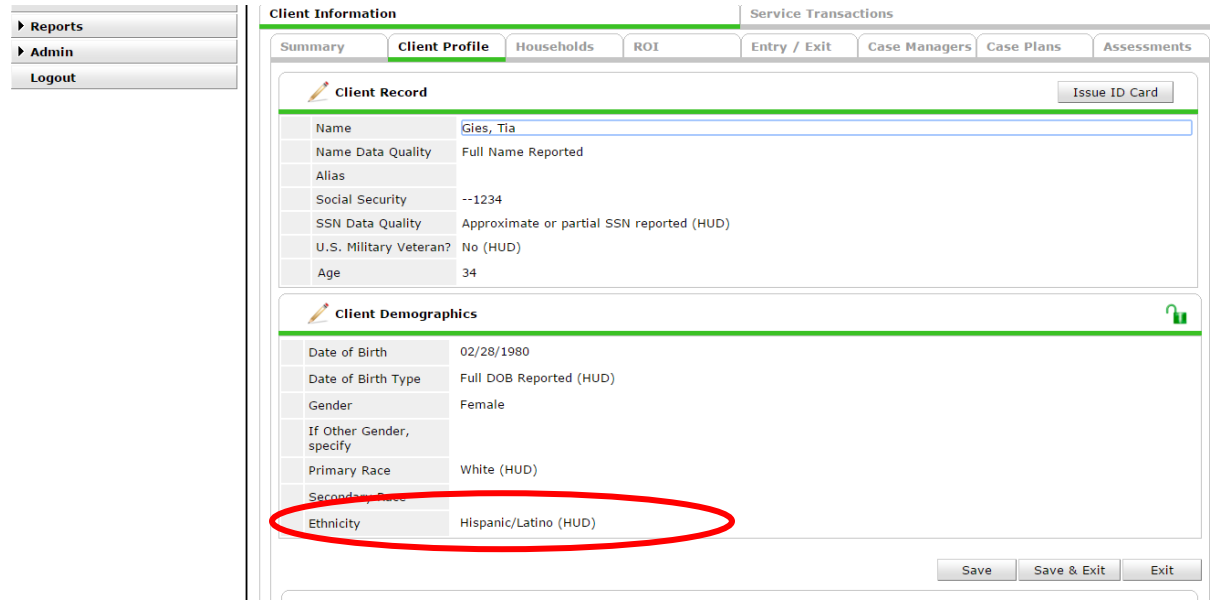
If you experience problems downloading, opening and saving reports, the problem seems to be resolved when the security settings for the computer are set to allow downloading, opening and saving files. For Windows 7 the settings are in Internet Options on the Control Panel. If you on a network where the IT department controls security settings, contact your IT person for assistance!!

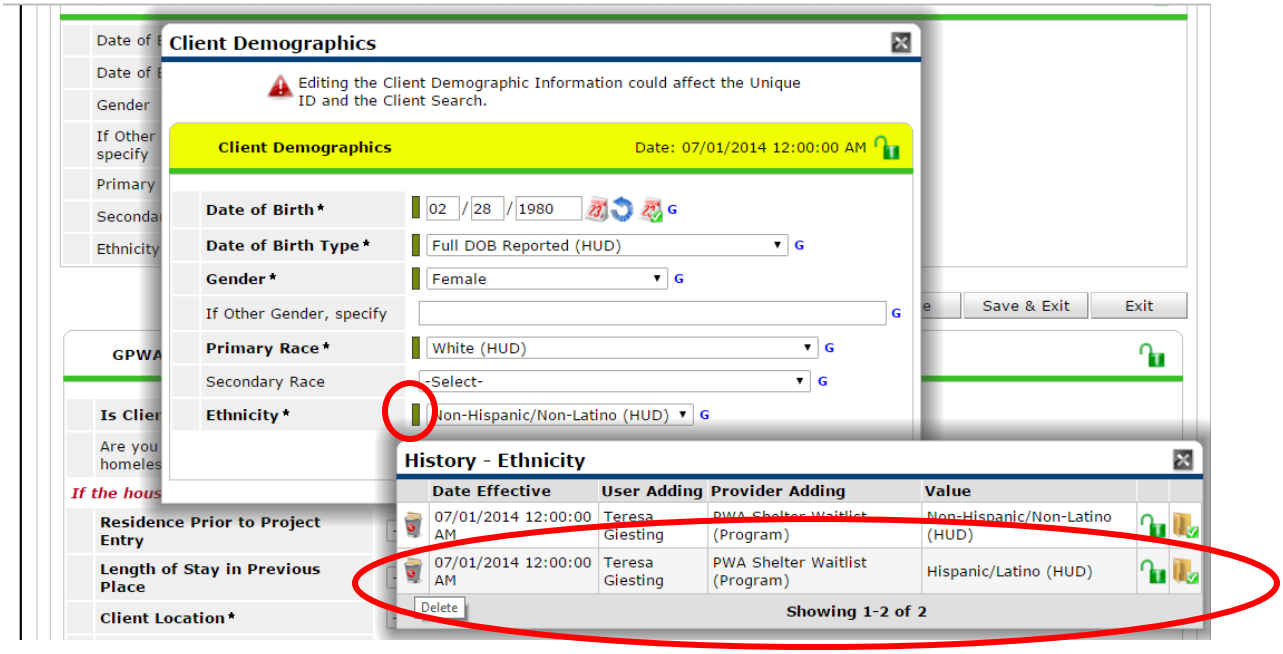


Correcting Data Entry Errors and NULL Values in Data Quality Report

Error*s* in Data regarding Name, SSN, Data Quality, Veteran, DOB, Gender, Race, Ethnicity must be corrected through the Client Profile Tab by clicking the Pencil to open the Client Record or Client Demographics. Backdate to the Date and Time of the initial incorrect entry. Make the correct selection. If the error is in Client Demographic fields, the incorrect entry must be removed by clicking on the History bar left of the field to remove the incorrect entry. Then Save. Click again on the History bar to make sure the incorrect entry has been removed. Then Save and Exit.

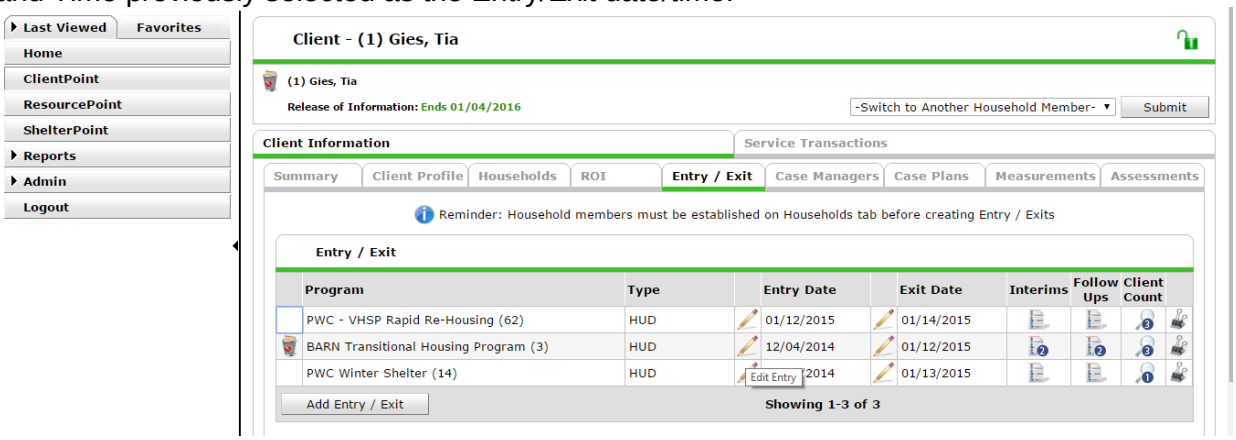
Note: if you don't remove the incorrect entry, reports will continue to pull from the initial incorrect selection!!





Errors in Data on Entry or Exit Assessments

Errors in Data associated with an Entry or Exit can be corrected by clicking the pencil to open the Entry or Exit with incorrect data. To correct information associated with the Entry or Exit it is not necessary to backdate because the information in these assessments is linked to the Date and Time previously selected as the Entry/Exit date/time.



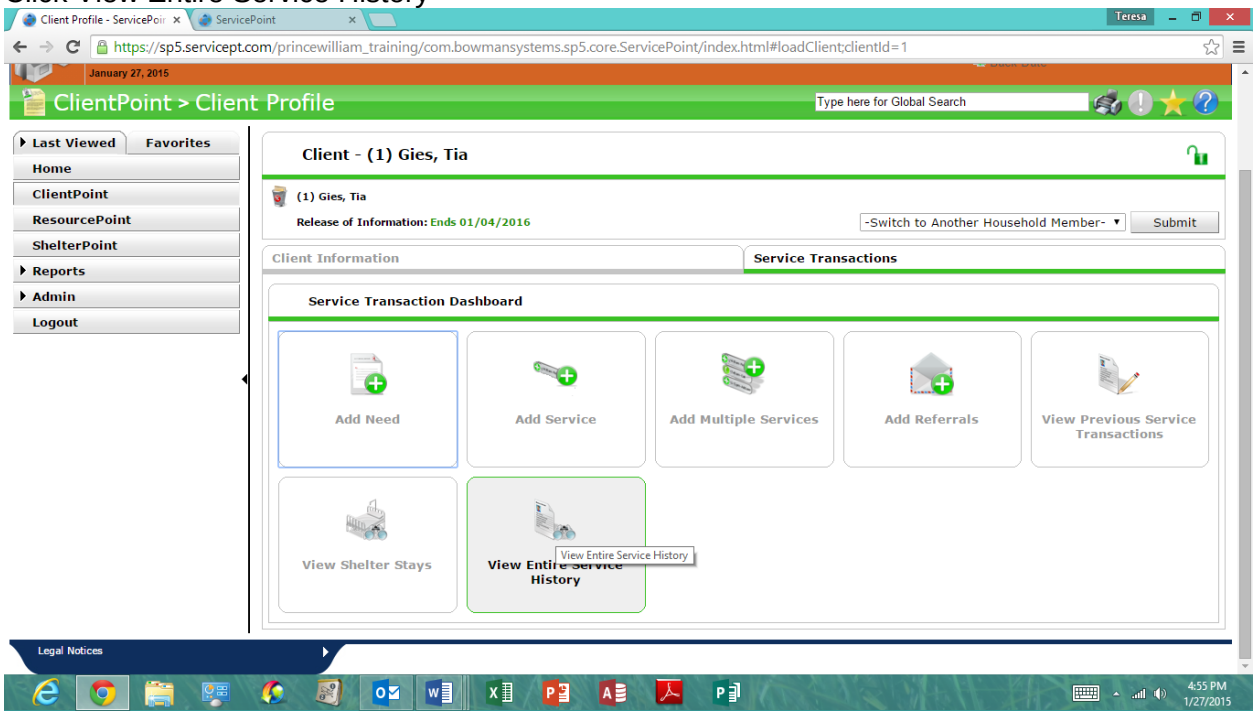
- Open the Entry or Exit with incorrect information by clicking the pencil.
- Click Save and Continue to open the Assessment.
- Re-answer any question that has the wrong answer.
- Remove the incorrect entry by clicking on the History bar left of the data field. Then Save. Click again on the History bar to make sure the incorrect entry has been removed. Then Save and Exit. (as shown in the previous example)

Note: if you don't remove the incorrect entry, reports will continue to pull from the initial incorrect selection!!

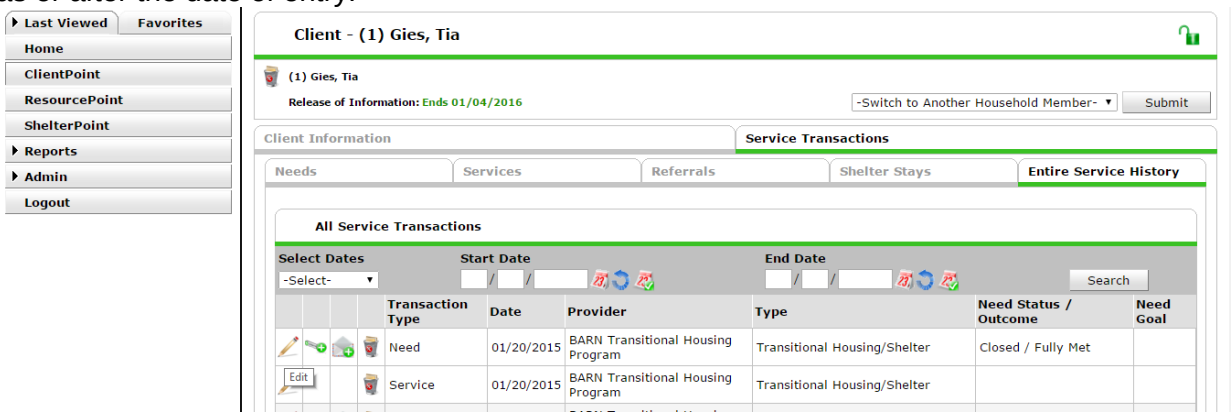
Data Quality Errors related to Services (SVS column of the 0252 Data Quality Report)

NULL values on the SVS column of the 0252 Data Quality Report are related to Services and could be caused by one of the following:

1. The client did not get checked into ShelterPoint bed.
   To correct, go to ShelterPoint to enter the client into shelterbed
2. Date/Time stamp of the Need/Service is before the Date/Time of the program entry.
   The Date and Time of the Need/Service must be dated on or after the date of Entry.
   Check the Date and Time associated with the Entry
   Open the Service Transaction Tab
   Click View Entire Service History



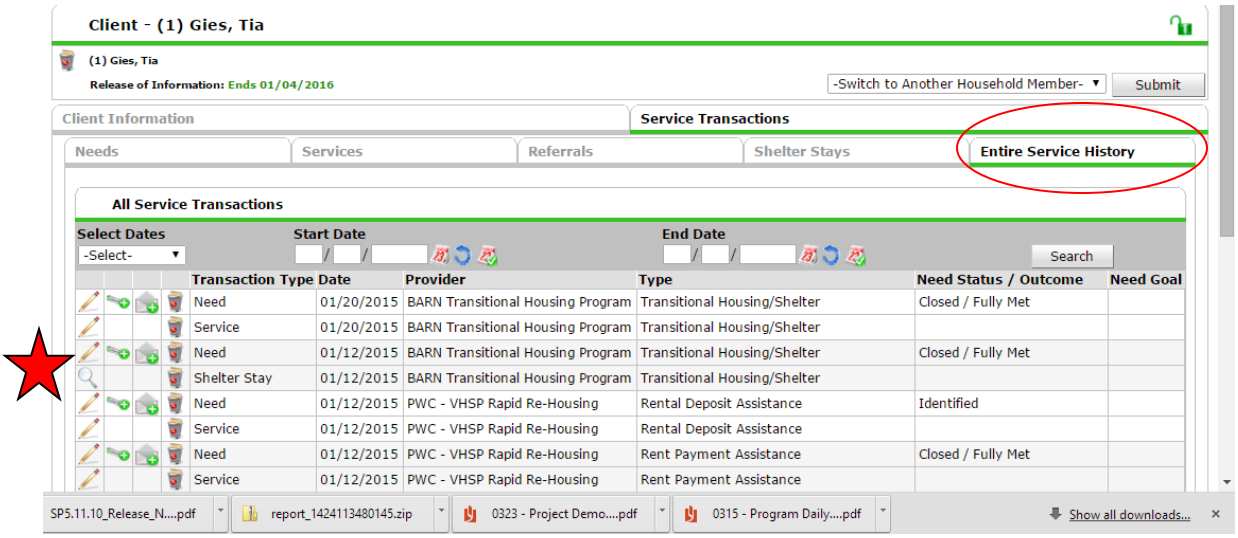
Click the pencil next to the Need, correct the date and time of the Need to be the same as or after the date of entry.
Click the pencil next to the Service, correct the date and time of the Service to be the same as or after the date of entry.



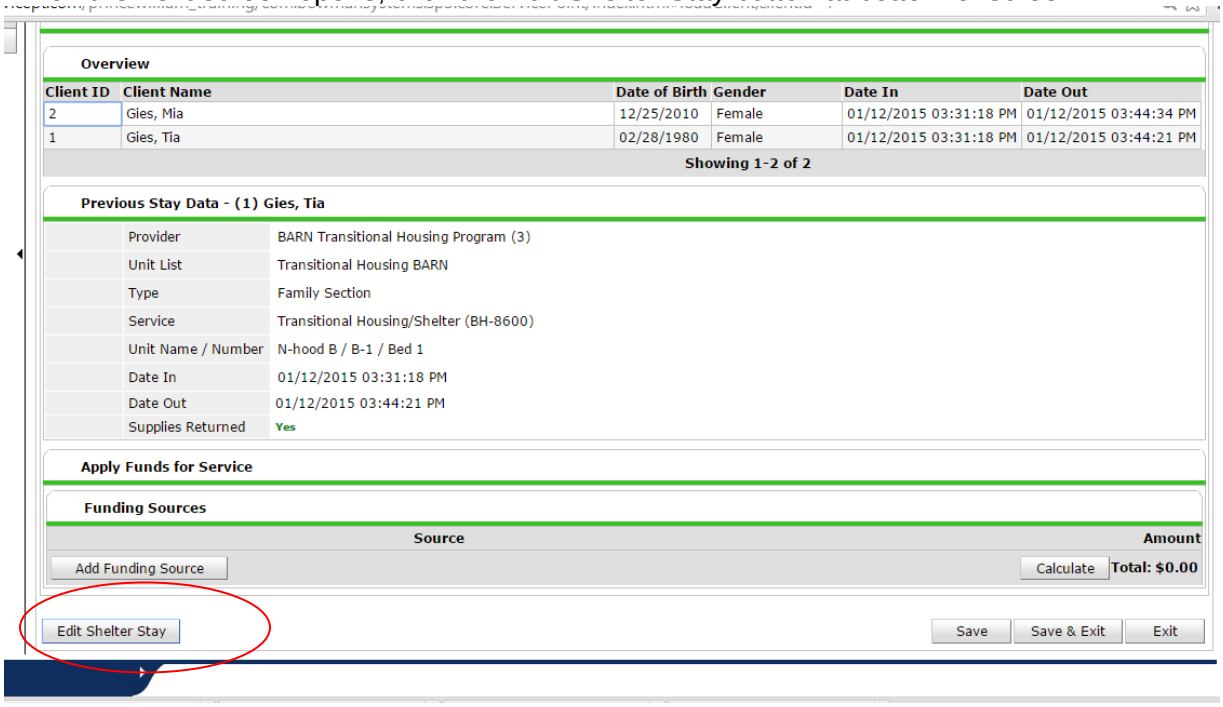
If the incorrect Date/Time is for a Shelterbed entry, and the client is still in the bed, the above correction can be made by changing the Date/Time of Need and then opening the

Service and Editing the Shelter Stay. If there is a household involved, you must do it separately through each household member's Service Transaction Tab.

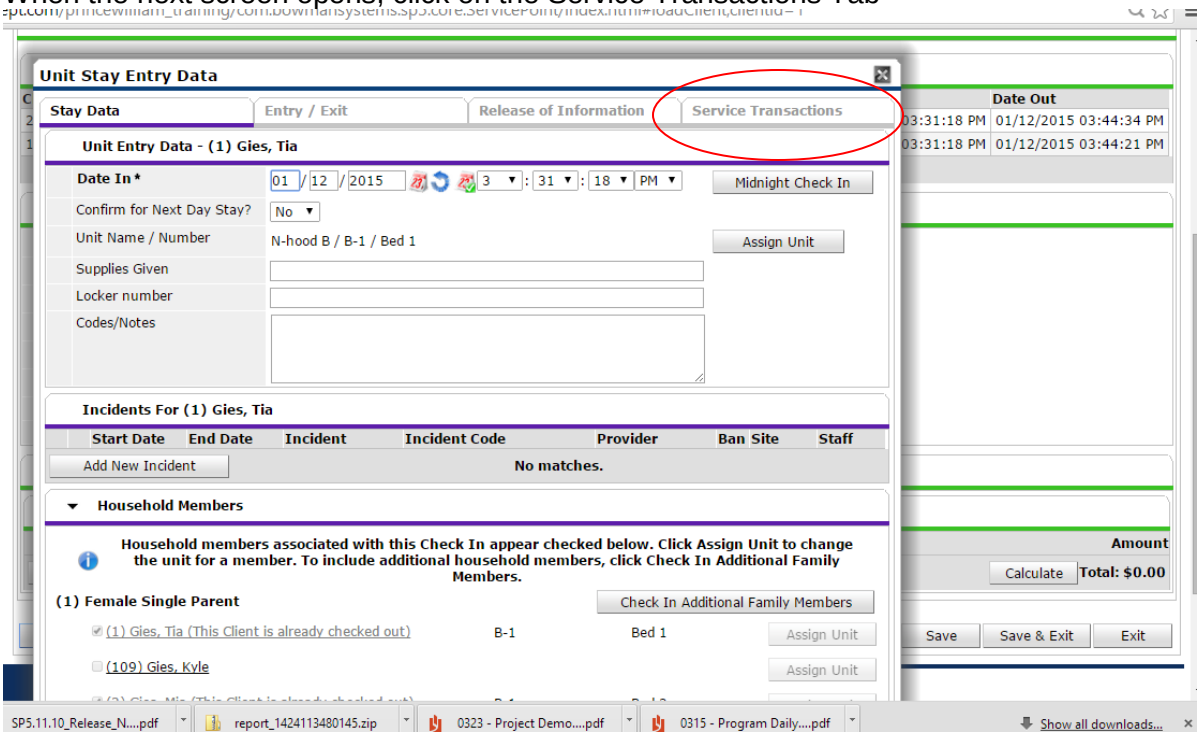
If the client has already checked out of the bed, Go to the Service Transaction Tab, Entire Service History
Click on the Magnifying glass next to the shelter stay needing correction


Client - (1) Gies, Tia
(1) Gies, Tia
Release of Information: Ends 01/04/2016
-Switch to Another Household Member-
Submit
Client Information
Service Transactions
Needs
Services
Referrals
Shelter Stays
Entire Service History
All Service Transactions
Select Dates
-Select-
Start Date
End Date
Search
Transaction Type
Date
Provider
Type
Need Status / Outcome
Need Goal
Need 01/20/2015 BARN Transitional Housing Program Transitional Housing/Shelter Closed / Fully Met
Service 01/20/2015 BARN Transitional Housing Program Transitional Housing/Shelter
Need 01/12/2015 BARN Transitional Housing Program Transitional Housing/Shelter Closed / Fully Met
Shelter Stay 01/12/2015 BARN Transitional Housing Program Transitional Housing/Shelter
Need 01/12/2015 PWC - VHSP Rapid Re-Housing Rental Deposit Assistance Identified
Service 01/12/2015 PWC - VHSP Rapid Re-Housing Rental Deposit Assistance
Need 01/12/2015 PWC - VHSP Rapid Re-Housing Rent Payment Assistance Closed / Fully Met
Service 01/12/2015 PWC - VHSP Rapid Re-Housing Rent Payment Assistance
SP5.11.10_Release_N....pdf
report_1424113480145.zip
0323 - Project Demo....pdf
0315 - Program Daily....pdf
Show all downloads...

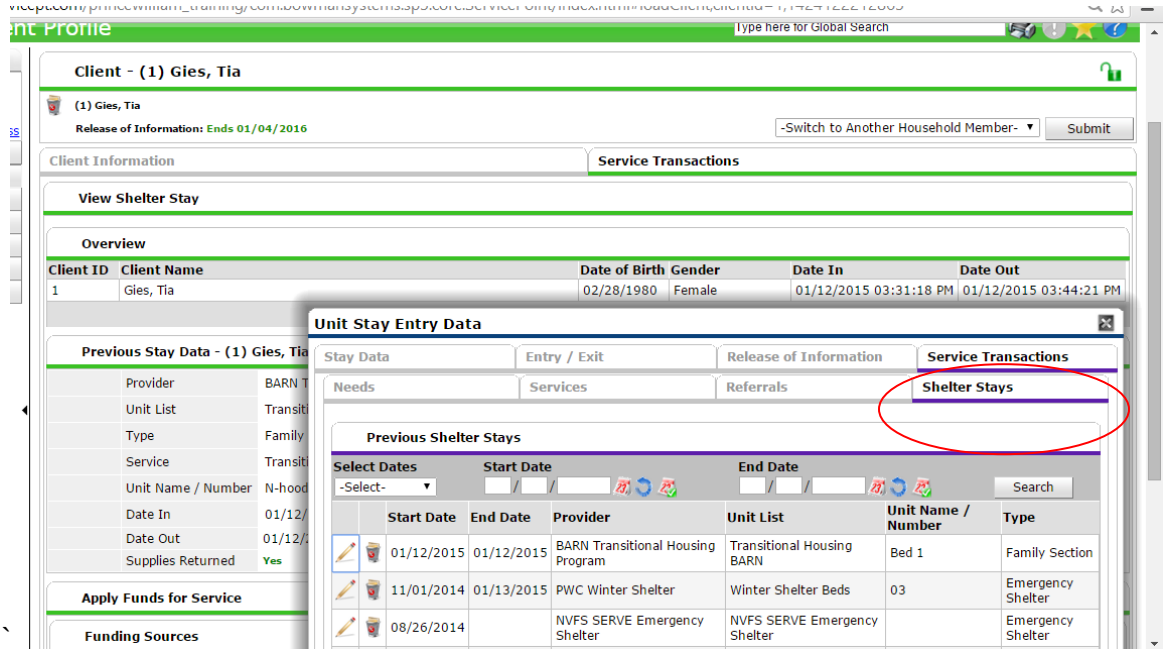
When the next screen opens, click the Edit Shelter Stay button at bottom of screen



When the next screen opens, click on the Service Transactions Tab



When the next screen opens, open the Shelter Stays Tab to change the incorrect Date In or Date Out.
Click the pencil next to the incorrect shelter stay, change the incorrect date.
Save.



The above process must be completed for each member of the household.

Data Quality Errors related to Income, Non Cash, Medical Insurance, and Disability

NULL values on the 0252 Data Quality Report in Income, Non Cash, Medical Insurance or Disability at Entry or Exit are caused by conflicting information such as:

1. A “Yes” answer to “Income from Any Source?”, but no Source and Amount of Income was put into the Income Subassessment.
   To correct: Click the pencil next to the type of income to be added. Input the Source, Amount, and make the start date prior to the entry date.
2. A “No” answer to “Income from Any Source?”, but the Source and Amount of Income was entered into the Income Subassessment.
   To correct: Re answer the question “Yes”. Remove the “No” answer by clicking the history status bar left of the data field to open the history, click the recycle icon next to the No answer. Save. Check to make sure the No was removed. Save and Exit.
3. There is a “Yes” answer to “Income from Any Source?”, and the Source and Amount of Income was entered, but there is NULL on the report. Reason: Start Date is after the Date of Entry and system doesn’t recognize client as coming in with income.
   To correct: Check the Start Date of the Income. To be associated with the Date of Entry, the start date must be on or before the date of entry for the system to recognize the client is coming in with income.

For Non Cash, Medical Insurance and Disability NULL values in the 0252 Data Quality Report the same logic applies as described for Income.

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